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Research Report

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Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

MOVIE GOING
IN THE UNITED STATES

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports are designed to promote the efficient use of the newspaper medium for the advertising and marketing needs of individual companies.

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The Return of Hollywood's Mass Audience

In 1946, the average American went to the movies 29 times a year; by 1984, the average was down to five times. In recent years, movies have been a major element of television programming. Yet going out to the movies remains a very special form of entertainment, and it remains a most popular form of dating. A 1984 survey by the Opinion Research Corporation finds that individuals 12 to 17 years old go to the movies twice as often as adults and account for over a fifth of all movie admissions among people of 12 and over.*

That same study showed that about 85% of the admissions were accounted for by people between 12 and 39.

Since 1970, yearly admissions to the movies have been gradually rising from about 920 million to about 1200 million in '84. That is an increase of about 30% but that increase should be considered in terms of the total number of people who are likely to be the audience: those who were between 12 and 39 years old. By how much was that group of people increasing between 1970 and 1984? Because of the way the Census categorizes age, it is convenient to use the group who were between 10 and 39 years old as a reasonable estimate of the major audience for movies. It turns out that this group increased by about the same proportion as admissions, over the period of 1970 to 1984.

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* Teenagers spend 27% less time watching television than does the average American, according to the A. C. Nielsen Company. Teenage movie-going is included in a new Newspaper Advertising Bureau survey made in Canada, which will be reported shortly.

The average person in this age group went to the movies 8.48 times during the year 1970. In 1984 the average was 8.80 and there was minor fluctuation around those two numbers in the intervening years. (This calculation can be made by dividing 85% of all admissions by the number of people in the group.)

The stability of those numbers can be demonstrated by looking at the number of admissions per person in this group before television. The figure for 1950 was 37.58, which is more than four times as high as the figure for 1970.

All of these admissions per person per year figures should be taken as nothing more than rough estimates since they are based on the assumption that this age group has always accounted for 85% of the admissions. That may not be true. However, had this group accounted for more than 85% in earlier years then the differences would be more extreme.

Just as television had a major effect on movie-going in the 1950s and '60s, so another electronic marvel, the VCR, may have an effect on movie-going in the late 1980s. It has already had an effect on the marketing of movies for use with VCR's.

MOVIE ADMISSIONS AND POPULATION 10 TO 39 YEARS FROM 1960 - 1984

	Movie Admissions* (millions)	Population** 10-39 years (000's)	Admissions*** per Person
1950	3,017.0	68,223	37.58
1960	1,304.5	76,091	14.57
1970	920.6	92,242	8.48
1975	1,032.8	102,517	8.56
1980	1,021.5	110,059	7.89
1982	1,175.4	113,053	8.84
1984	1,199.1	115,866	8.80

* Source: MMPA

** Source: Statistical Abstracts

*** 85% of Movie Admissions divided by population (see text)

How The Study Was Done

The sample for this study is 1,000 respondents, contacted by telephone from a list of random phone numbers provided by Survey Sampling, Inc. The interviews were conducted in May 1985 from a central location. No more than one respondent was interviewed from each household and each respondent was chosen by a random process from among the adults in the household. The sample was balanced on age and sex. Henry Senft Associates was responsible for the fieldwork and the tabulations, under the direction of the Newspaper Advertising Bureau. The remainder of the research process (design, questionnaire, analysis and report) was carried out by Leo Bogart and B. Stuart Tolley of the Newspaper Advertising Bureau.

America's Love Affair with Movies

In our world, movie theatres dot the landscape and movies on television are a constant. Movies are so ubiquitous that they become commonplace. It is sometimes easy to forget the place movies play in the lives of our citizenry.

Ages past had their meistersingers, traveling troubadors and story-tellers. For modern Americans, fantasy often comes in four colors, with action and Dolby sound. Like the stories told around a campfire, movies are not just something perceived in the abstract--they are experiences that are lived, albeit vicariously. They are experiences people want to share with friends and loved ones. As fantasies they serve many purposes--they excite, they soothe, they present points of view, they are surrogates for what we would like to do or be ourselves; they provide humor, pathos, a civilizing influence and sometimes darker moods.

Because of movie theatres, movies have become a social event as well as a personal experience. Movies are dates. Movies are group activities. Movies are families. Seeing movies is a social experience. Even at home, where it is possible to watch movies on TV alone, it is likely that people prefer to watch with other members of the family, or friends.

These two variables--the nature of the experience of watching a movie and the use of movies as social events--account for a number of facts of movie going. Both are parts of the web of the American society. There are two others, also easily identifiable, that account for much of the rest: money and age. It might as well be a requirement that in order to be a teenager, one must go to the movies often, regardless of where one lives or how far away the nearest theatre is. However, increasing age brings more responsibilities and more channels of experience. As people age they find many additional activities available, pleasurable or just plain necessary. Other leisure pursuits compete with movies.

As people marry and have children they have less time for themselves. As careers begin and develop, people choose to spend more "free" time on careers instead of in leisure activities. What is a dominant activity during the teenage years--movies--becomes only one of many kinds of activity in later years. Thus do people become more selective in the movies they see.

Before television, the only way for most people to see movies was to go to a movie theatre. To experience this particular kind of social fantasy, one had to have the price of admission. For families, that sometimes meant tickets for an extended family. As the 1950s and '60s made more common the small nuclear family of parents and children without aunts, uncles, grandparents, and other relatives, so going to the movies came to mean buying dinner at a restaurant and paying a baby-sitter and that was even more money. It is no surprise that having a certain minimum amount of money makes it easier for people to engage in the social experience/fantasies that movies create in the theatre. Of course, those who enjoy movies the most are often willing to do without other things if they must choose how they are to spend limited resources.

Who Goes to the Movies?

Our survey shows that the 24% of the public who go once a month or more often represent 83% of adult movie admissions. Of these film buffs, two out of five are between 18 and 24, (an age group that makes up only 18% of all adults) and almost 70% are under 35. Being younger, nearly half of the frequent movie goers are single, and they are also above average in education. They also have more money--at least over $15,000 per family. (By contrast, among the one out of three adults who is over 50, 72% haven't gone to the movies in the past year.)

The Experience of Going to the Movies

Frequent filmgoers differ very little from other people in the way they make up their minds to see a film or in what they want to know about it. The social character of movie-going shows up clearly here. We asked people about the last movie they had gone to see and found that hardly anyone (5%) goes alone. A majority go with another member of the household. Even among the frequent moviegoers, only about half go with a date or another companion outside the family. Whether with a date, family members or other friends, usually the decision to go to the movies is made jointly. Three out of five filmgoers go out for a meal or refreshments either before or after the show, and two out of three buy something to eat or drink at the theatre itself.

The appeal of vicariously living through certain experiences instead of others might explain why 59% say they decided to go when they did the last time because they wanted to see a particular film rather than because they just felt like going out. Even among those who gave this last answer, three out of five knew what film was playing. This kind of social experience generally doesn't take a lot of advance planning. In two out of three cases (65%) the decision is made the same day or the night before.

Typically, people go to a theatre in their own neighborhood, and have a choice of about five different films to see at that location. However that some movie theatres have many films showing and others only one means that some respondents have a choice of only a few while others are faced with many alternatives. But 44% travel outside the immediate vicinity to catch a film they don't want to miss. The films they see are usually the heavily promoted new ones that generate publicity, reviews and discussion. Seven out of ten saw their last movie within a month after it first opened, more than four out of ten within the first week.

The new movies remain, in fact, a reliable topic of conversation. Among all the people who have gone to the movies within the past year, only 6% admit that they have above average interest in the private lives of the stars, but two out of five (39%) recall discussing the last film they saw before they went to see it, and seven out of ten (71%) have talked about it since. Perhaps re-living the experience is more interesting than the anticipation.

People feel good about the movies that they see, with the frequent moviegoers only slightly more positive than the rest of the public. Three out of five rate the last film they saw as outstanding (26%) or as above average (35%); 31% rate it average; only 7% rate it below average or poor.

FREQUENCY OF ATTENDING MOVIES

	Total
Base: Total Respondents	(1000)
In last month	24%
Three or four times in last six months	8
Less often but in last year	24
Not in last year	44
Total	100%

MARITAL STATUS BY FREQUENCY OF MOVING GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in last year
Base: Total Respondents	(1000)	(259)	(332)	(406)
Married	61%	41%	60%	72%
Single	22	47	23	8
Divorced/Separated	10	10	12	10
Widowed	6	2	5	10
No answer	-	-	-	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

AGE BY FREQUENCY OF MOVIE GOING

Age	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in last year
Base: Total respondents	(1000)	(259)	(332)	(406)
18-24	18%	39%	18%	6%
25-29	14	17	19	9
30-34	12	13	15	9
35-44	17	15	21	16
45-49	6	4	6	7
50 +	33	11	20	52
Total	100%	100%	100%	100%

EDUCATION BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers		Infrequent Movie Goers		Not in last year	
Base: Total Respondents	(1000)	(259)		(332)		(406)	
College graduate or more	17%	17%	42	22%	41	12%	23
Some College	17	26		19		11	
High school graduate	39	39		38		40	
Some high school or less	27	18		21		36	
No answer	1	-		-		1	
Total	100%	100%		100%		100%	

Note: All bases unweighted.

INCOME BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in last year
Base: Total Respondents	(1000)	(259)	(332)	(406)
Income				
Under $15,000	23%	15%	20%	29%
$15,000-24,999	17	20	15	17
$25,000-34,999	21	24	23	17
$35,000 & Up	19	25	22	15
No answer	20	16	20	22
Total	100%	100%	100%	100%

SEX BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in last year
Base: Total Respondents	(1000)	(259)	(332)	(406)
Sex				
Male	48%	50%	48%	46%
Female	52	50	52	54
Total	100%	100%	100%	100%

Note: All bases unweighted.

WHETHER WENT ALONE

	Total	Last month	Infrequent
Base: Went to movies in past year	(593)	(259)	(332)
Went alone	5%	5%	5%
With someone else	94	94	95
No answer	1	1	-
Total	100%	100%	100%

WHO WENT WITH

	Total	Last month	Infrequent
Base: Went with someone else	(557)	(242)	(332)
In household	57%	47%	50%
Not in household	43	53	50
Total	100%	100%	100%

Note: All bases unweighted.

WHO DECIDED TO GO TO MOVIES

	Total	Last month	Infrequent
Base: Went with someone else	(557)	(242)	(314)
Respondent made decision	16%	18%	15%
Other person's idea	16	17	16
Decided together	67	65	68
No answer	-	-	1
Total	100%	100%	100%

WHY DECIDED TO GO

	Total	Last month	Infrequent
Base: Went to movies in past year	(593)	(259)	(332)
Just felt like going out	41%	40%	42%
Wanted to see particular movie	59	59	58
No answer	-	-	-
Total	100%	100%	100%

Note: All bases unweighted.

Movies Vs. Other Leisure-Time Activities

We asked our sample how they like to spend their free time. From this kind of question, it is possible to put movies into perspective against all the other uses of leisure time. For the sample as a whole, one respondent in twenty said that going to the movies was his or her favorite way of spending time. Of course among those who go to the movies often--once a month or more often--a much larger proportion say movies are the favorite leisure time activity. It is about one out of nine, or 11%.

Outdoor sports are a favorite for half the population. Watching television and reading are also preferred leisure time activities for one person out of five. Dating, dancing, socializing, eating out or partying are the favorite free-time activities for about one person in eight.

Compared to those who go to movies hardly at all, frequent movie goers are more likely to mention outdoor sports (except for hunting and fishing), dating, (etc.), and listening to music or the radio. Those who rarely go to movies are more likely to mention playing cards or sewing and working around the house or garden or on the car, in addition to hunting and fishing, as free-time favorites. These preferences are consistent with the demographic differences between frequent movie goers and those who go less often--the older married non-movie goers are more likely to be oriented to home and sedentary pursuits. They are also less likely to be dancing, partying, etc.

Those living in more rural areas with less discretionary money available and easier access to forests and streams are more likely to be hunting and fishing. The non-movie goers also mention fewer leisure time activities than do the movie goers. This also is consistent with the more active single lifestyle of younger movie goers.

Learning About Movies

People find out about new films from the newspapers (37% among frequent movie goers) and from television (32%). One in three (31%) finds out before the film is launched, 28% at the time of release, and 39% afterwards. A majority say they usually pay attention to movie reviews, and 36% had read reviews or commentary on the last film they saw. Of these, 54% saw them in the newspaper; 40% on TV, and 12% in a magazine.

Compared to those remembering reviews or commentaries, more (three out of five-61%) remember coming across advertising for the last film they saw, before they saw it. Most mention several sources, with equal numbers (55%) naming newspapers and TV. (Most initial launch promotions rely heavily on TV.)* Of those who recall advertising, about half (47%) remember something, but their recollections don't focus on any specifics like the actors, plot, or type.

What are the kinds of things people want to know before they decide to go see a film? Frequent movie goers don't differ very much from the rest of the movie-going public in their answers to this open-ended question. Thirty-six percent want to know about the plot; 32% the actors; 22% the rating; 14% what type of film it is. (Another 9% say they want to know if it's "clean," "not trashy.") 13% want reassurance that it's worth seeing, and 7% want to know what the reviews have said. The infrequent movie goers are more interested than others in comedies.

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* We checked 21 markets (through BAR reports) to see what spot television advertising was on the air for new movies during the first week in June, 1985. On average, 6.4 different new movies were being advertised in each market. Each movie received 11.5 spots a week, at a cost of about $5800 per market, and accumulated 64 adults GRPs a week. (Each GRP represents 1% of the public, whether reached for the first or the umpteenth time.) In a week, the commercials for a typical film fell between programs that were watched by 33% of the public, an average of 1.9 times. (This doesn't, of course, mean that 33% of the public saw a commercial, because they may have been out of the room or not paying attention.)

Among frequent movie goers, 25% always look at movie ads. Another 18% often look at them even when they're not thinking of going out, and 34% look at them when they're thinking of going out. Only 23% hardly ever look at them. Even among those who hadn't been to a movie for a year, about a third sometimes look at movie ads.

What information do Frequent Movie Goers need in movie ads? We asked them to select from a list. 84% want starting times; 69% the address of the theatres; 67% the rating; 53% a description of the plot; 51% the admission price; 44% the names of the supporting cast; 29% a picture of the stars; 19% the name of the director. Infrequent movie goers and even those who hadn't been to a movie for a year gave essentially the same answers.

Yet a content analysis of 333 movie ads appearing in a cross-section of 17 newspapers from around the U.S. in June 1985 shows the following:

94% were smaller than one column by 2½".

85% gave the rating (G, X, etc.).

34% told the price of admission.

19% mentioned the names of the stars.

11% had an illustration.

10% carried at least a phrase or line of text that conveyed some notion of the theme or subject of the film.

6% quoted a phrase or more from a review.

It's obvious that because they're so small, distributor-placed ads don't give enough information to tell people what they say they want to know before they go to see a film; to remind them of what it's about and who's in it; to reinforce the effects of "launch" advertising (mostly on TV); to provide some motivation to see that film rather than some other.

HOW FIRST FOUND OUT ABOUT MOVIE

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Went to movies in past year	(593)	(259)	(332)
Friends	20%	20%	20%
TV	33	32	35
Newspaper	34	37	33
Coming attractions/ previews	3	3	3
Outdoor posters	4	3	5
No answer	11	11	10

Totals add to more than 100% because of multiple answers.

WHEN FOUND OUT LAST FILM

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Went to movies in past year	(593)	(259)	(332)
Before release	31%	33%	30%
At time of release	28	27	28
Afterwards	39	38	40
No answer	2	2	2
Total	100%	100%	100%

Note: All bases unweighted.

REVIEWS & COMMENTARIES
USUALLY PAY ATTENTION

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Went to movies in past year	(593)	(259)	(332)
Yes	53%	56%	50%
No	47	43	50
No answer	*	1	-
Total	100%	100%	100%

SAW BEFORE LAST FILM

Yes	36%	38%	34%
No	63	60	66
No answer	1	2	-
Total	100%	100%	100%

Note: All bases unweighted.

MEDIA CONTAINING REVIEWS & COMMENTARIES

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Saw review or commentary before last film	(225)	(99)	(126)
Newspaper	54%	51%	56%
Television	40	41	39
Magazine	12	11	12
Radio	4	6	2
Other	7	10	6
No answer	5	4	6

Totals add to more than 100% because of multiple mentions.

Note: All bases unweighted.

RECALL OF ADVERTISING FOR LAST FILM

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Went to movies in last year	(593)	(259)	(332)
Recalled	61%	58%	63%
Did not	37	39	35
No answer	2	3	2
Total	100%	100%	100%

RECALLED ANY SPECIFICS IN ADS

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Recalled advertising	(357)	(148)	(209)
Recalled specifics	47%	50%	44%
Nothing specific	53	50	56
Total	100%	100%	100%

Note: All bases unweighted.

RECALL OF MEDIA CARRYING ADVERTISING FOR LAST FILM

	Total	Frequent Movie Goers	Infrequent Movie Goers
Base: Recalled advertising	(357)	(148)	(209)
Newspaper	55%	52%	56%
Television	55	61	51
Magazine	6	5	7
Coming attractions	4	3	5
Radio	2	3	2
Outdoor	2	2	2
Other	1	1	1
No answer	2	2	3

Totals add to more than 100% because of multiple mentions.

Note: All bases unweighted.

INFORMATION WANTED ABOUT A NEW FILM
OPEN-END QUESTION

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: All respondents	(1000)	(259)	(332)	(406)
Plot	30%	36%	29%	27%
Actors	25	32	29	17
Rating	21	22	23	19
What kind	17	14	16	19
Worth seeing/interesting	12	13	14	10
Clean	11	9	13	11
Comedy	8	5	12	7
Reviews	6	7	6	5
Don't care, nothing	10	3	7	16

Totals add to more than 100% because of multiple answers.

Note: All bases unweighted.

FREQUENCY OF LOOKING AT NEWSPAPER MOVIE ADS

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: All respondents	(1000)	(259)	(332)	(406)
Always look	14	25%	14%	7%
Often look, even when not thinking of going out	15	18	19	11
Only when thinking of going out	26	34	33	16
Hardly ever look	45	23	34	65
No answer	*	-	-	1
Total	100%	100%	100%	100%

Note: All bases unweighted.

INFORMATION WANTED ABOUT A NEW FILM
CHECK-OFF LIST

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: All respondents	(1000)	(259)	(332)	(406)
Starting times	79%	84%	85%	71%
Rating	71	67	75	70
Address	67	69	71	62
Price	54	51	55	55
Where/When plot takes place	50	53	54	47
Names of supporting cast	50	44	53	51
Picture of stars	32	29	32	33
Director's name	17	19	17	15
Average number of items checked	4.20	4.16	4.42	4.04

Note: All bases unweighted.

The Impact of Cable

People who like to watch movies watch them any way they can. While 34% of the public have watched a movie on TV within the last seven days (and 5% have seen more than one), the proportion goes up to 39% among Frequent Movie Goers. Frequent Movie Goers are likely to say that, if there's a difference between movies on TV and other TV programing, movies are the more interesting. And 77% of the Frequent Movie Goers, compared with only 43% of the general public, prefer to go out to see a new movie rather than to watch it on TV, reinforcing the point that the occasion of going out comes first and then the attraction of the specific film.

But the opportunity to see movies on TV has grown dramatically. In 1985, cable passed more than seven out of ten American homes, and nearly half (44%) were cable subscribers. Over half of these elected to pay extra for one or more pay tiers, and about five million households also had access to pay-per-view systems with no fixed subscription fee.

Households that are willing to pay for cable, and especially the surcharge for pay cable, tend to be those that both can afford it and are the most heavily oriented to entertainment. Large families, for instance, do the most viewing, and pay cable households, according to A. C. Nielsen, are 16% larger than non-cable households. It is not surprising that our survey finds cable subscribers also to be slightly above average in their theatrical movie-going.

The pay cable audience ranks somewhat above average in income and education, and in its proportion of two-wage-earner families, but its age distribution is also slightly more youthful than that of the population in general. Among people with pay cable, 64% have watched a movie on it within the past week and 33% have watched three or more. This means that pay cable has increased the momentum of restoring current motion pictures to the mass audience, while during the last forty years theatre audiences have been largely limited to an audience of young people. The coming of the videocassette recorder makes this reorientation even more significant.

NUMBER OF TV MOVIES SEEN IN PAST WEEK

	Total	Last Month	Infrequent	Not in Last Year
Base: Total Respondents	(1000)	(259)	(332)	(406)
None	66%	61%	62%	71%
Any	34	39	38	29
1	29	35	33	24
2	4	3	4	3
3	1	*	1	1
4	*	–	–	*
5 +	*	*	1	*
Average	.42	.45	.47	.36

Note: All bases unweighted.

INTEREST OF MOVIES ON TV VS. OTHER TV

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Total Respondents	(1000)	(259)	(332)	(406)
About as interesting	43%	45%	44%	41%
More interesting	26	32	25	24
Less interesting	31	23	31	34
No answer	*	*	-	-
Total	100%	100%	100%	100%

*=less than .5%

NEW MOVIES -- THEATRE VS. WAIT FOR TV SHOWING

Prefer to go to theatre	43%	77%	52%	18%
Prefer to wait for TV showing	57	22	48	82
No answer	*	1	*	*
Total	100%	100%	100%	100%

HAVE CABLE TV

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Total Respondents	(1000)	(259)	(332)	(406)
Yes	48%	53%	51%	43%
No	51	47	48	56
No answer	1	-	1	1
Total	100%	100%	100%	100%

Note: All bases unweighted.

FREQUENCY OF MOVIE GOING: BY CABLE SUBSCRIBERS, PAY CABLE SUBSCRIBERS AND VCR OWNERS

	Total	Have Cable	Pay Cable	Own VCR
Base: All respondents	(1000)	(488)	(279)	(278)
Went to movies in last month	24%	27%	29%	31%
Not in last month but in last six months	25	26	28	25
Not in last six months but in last year	7	7	5	7
Not in last year	44	40	37	37
No answer	-	-	1	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

FAMILY INCOME: BY CABLE SUBSCRIBERS, PAY CABLE SUBSCRIBERS AND VCR OWNERS

	Total	Have Cable	Pay Cable	Own VCR
Base:	(1000)	(488)	(279)	(278)
Under $15,000	23%	21%	13%	8%
$15,000 - $24,999	17	14	14	15
$25,000 - $34,999	21	23	27	24
$35,000 or more	19	26	31	33
No answer	20	16	15	20
Total	100%	100%	100%	100%

Note: All bases unweighted.

RESPONDENT'S EDUCATION: BY CABLE SUBSCRIBERS, PAY CABLE SUBSCRIBERS AND VCR OWNERS

	Total	Have Cable	Pay Cable	Own VCR
Base:	(1000)	(488)	(279)	(278)
Some high school or less	27%	21%	16%	22%
High school graduate	39	42	45	37
Some college	17	18	21	21
College graduate or above	16	19	18	19
No answer	1	*	-	1
Total	100%	100%	100%	100%

Note: All bases unweighted.

NUMBER ADULTS WORKING FULL TIME: BY CABLE SUBSCRIBERS, PAY CABLE SUBSCRIBERS AND VCR OWNERS

	Total	Have Cable	Pay Cable	Own VCR
Base:	(1000)	(488)	(279)	(278)
0	24%	21%	16%	9%
1	40	39	36	37
2	27	30	37	37
3	7	8	9	12
4 +	2	2	2	5
Total	100%	100%	100%	100%

Note: All bases unweighted.

NUMBER OF EVENINGS WATCHED PAY TV IN LAST WEEK AMONG VCR OWNERS

	Total	Own VCR
Base:	(279)	(99)
Have pay TV		
0	34%	40%
1	14	16
2	16	15
3	14	11
4	5	8
5	6	6
6	2	1
7	7	3
No answer	2	-
Average	2.01	1.69
Total	100%	100%

Note: All bases unweighted.

The VCR and the Mass Market for Movies

By 1985, one out of four homes in the country owned a VCR (27% in our survey), and 40% of the owners had acquired them within the past year. If that annual growth rate were to continue, everyone in the country would have a VCR by the end of the decade. Although this is not likely to happen, all indications suggest that VCRs will eventually be almost as common as TV sets. VCRs are most often found in the homes of entertainment-minded people--those who are frequent movie goers (34%) and those who subscribe to pay cable (33%).

Has the VCR cut into film attendance? Fifty-six percent of VCR owners say their outside movie-going hasn't changed; 41% say it's less, 2% more. Apart from the time they spend with their VCRs, 28% say they're watching TV less, 6% say they're watching more. The remaining two-thirds say they haven't changed.

While VCR owners say they are going out to movies less than before they bought their VCRs, they are still good movie theatre prospects--they go more often than non-VCR owners. For instance: (1) On the average they go to almost 9 movies a year per person (8.94), as opposed to a little more than 6 per year per person for non-VCR owners (6.21); (2) More VCR owners went to the movies in the last month than non-VCR owners (31% vs. 22%); and (3) Fewer VCR owners have not been to the movies in the last year than non-VCR owners (37% vs. 47%).

Why should this be so? It is true that VCR owners tend to be more youthful, but that doesn't seem the explanation. If, on the average, each VCR owner went to the movies as often as his or her age group does then the theoretical number of times the average VCR owner would go to a movie theatre in a year would be 7.78 instead of the 8.9 which is the actual average for the group. A more reasonable explanation is that regardless of age, VCR owners are more interested in movies than non-VCR owners. They may have cut back in their movie theatre attendance but it is still higher than non-VCR owners.

(The more recent VCR owners--those who have purchased within the last year--are even more extreme. They are younger and have lower incomes than those who have had their VCRs for a year or more. They go to the movie theatres even more often--10.1 times per person per year vs. 8.2 for the other VCR owners--and more often than the 8.5 times per person per year that would be expected, given their ages.)

While VCR owners indicate that their outside movie-going has been affected more than their TV viewing, the presence of the VCR has made movies an ever more significant feature of their lives. Just within the past week, two out of five (40%) have watched a movie they had previously recorded off the air. Nearly two out of five (36%) own videocassettes of movies--an average of ten.

VCR owners who are Frequent Movie Goers are more likely than others to own videocassettes but among those who do own one or more, Frequent Movie Goers are likely to own fewer videocassettes. Perhaps this is a function of income. But a video store typically rents twenty cassettes for each one it sells. And among VCR owners in our survey, three out of five have rented a videocassette within the past month--an average of nine. One in four has borrowed or exchanged videocassettes with friends. Not surprisingly, all these proportions are even higher among the VCR owners who are frequent movie goers. Fifty-nine percent generally decide what cassettes to get by browsing in the store; 37% know their choice ahead of time. Only 6% have seen the film before.

Naturally VCRs are also being used to record and play back sportscasts and regular TV programs at more convenient times (17% within the past week), as well as for an occasional home video. But it is clear that a principal use of the VCR is to watch movies and that it will vastly expand the mass film audience.

OWNERSHIP OF VCR: BY CABLE SUBSCRIBERS, PAY CABLE SUBSCRIBERS

	Total	Have Cable	Pay Cable
Base: All respondents	(1000)	(488)	(279)
Own VCR	27%	27%	33%
Don't	73	73	67
No answer	-	-	-
Total	100%	100%	100%

Note: All bases unweighted.

OWN VCR

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Total Respondents	(1000)	(259)	(332)	(406)
Yes	27%	34%	27%	22%
No	73	66	73	78
No answer	-	-	-	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

CHANGES IN TV VIEWING & MOVIE THEATRE GOING SINCE OWNING A VCR, AMONG VCR OWNERS, BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: VCR owners	(278)	(85)	(95)	(98)
No change in TV viewing	65%	66%	73%	56%
More	7	6	7	8
Less	27	28	18	36
No answer	1	-	2	-
Total	100%	100%	100%	100%

CHANGES IN MOVIE THEATRE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
No change	56%	61%	55%	53%
More	2	7	1	-
Less	41	32	43	47
No answer	1	-	1	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

MOVIE GOING: BY CABLE
SUBSCRIBERS, PAY CABLE SUBSCRIBERS AND VCR OWNERS

	Total	Have Cable	Pay Cable	Own VCR	Own VCR	
					Bought in last year	Bought earlier
Base: All Respondents	(1000)	(488)	(279)	(278)	(112)	(166)
Average number of attendances per person per year	6.92	7.71	8.44	8.94	10.10	8.17
"Theoretical" number of attendances per person per year to be expected if respondent's age were the sole determinant	6.92	7.23	7.51	7.78	8.53	7.39

Note: All bases unweighted.

LAST WEEK'S PLAY BACK OF MOVIES RECORDED PREVIOUSLY AMONG VCR OWNERS, BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: VCR Owners	(278)	(85)	(95)	(98)
Played back	40%	39%	37%	44%
Did not	59	61	61	46
No answer	1	-	2	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

OWN VIDEOCASSETTES OF MOVIES

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Own VCR	(278)	(85)	(95)	(98)
Yes	36%	44%	36%	30%
No	63	56	59	70
No answer	1	-	5	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

NUMBER OF VIDEOCASSETTES OF MOVIES OWNED

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Own VCR & Own Movies	(99)	(36)	(31)	(32)
1	10%	9%	16%	4%
2	15	11	21	12
3	7	17	-	3
4	8	13	3	6
5	6	6	13	-
6-9	17	16	19	13
10-20	21	13	22	32
21 +	15	15	3	30
No answer	1	-	3	-
Mean ...	9.71	8.50	6.91	14.18

Note: All bases unweighted.

RENTED VIDEOCASSETTES IN PAST MONTH

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Own VCR	(278)	(85)	(95)	(98)
Yes	58%	65%	60%	51%
No	41	35	36	49
No answer	1	-	4	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

NUMBER OF VIDEOCASSETTES RENTED PAST MONTH

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: Own VCR & Rented	(165)	(57)	(59)	(49)
1	6%	7%	6%	4%
2	9	5	14	10
3	9	9	10	9
4	14	13	15	15
5	7	12	6	4
6-9	19	18	16	24
10-20	29	32	24	31
21 +	5	3	10	2
No answer	1	1	-	1
Mean ...	8.80	8.84	8.95	8.56

Note: All bases unweighted.

BORROWED OR EXCHANGED VIDEOCASSETTES WITH FRIENDS IN PAST MONTH AMONG VCR OWNERS, BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: VCR Owners	(278)	(85)	(95)	(98)
Borrowed or exchanged videocassettes with friends in the past month	25%	30%	19%	26%
Did not	74	70	79	74
No answer	1	-	2	-
Total	100%	100%	100%	100%

Note: All bases unweighted.

HOW DECIDED WHAT CASSETTES TO GET AMONG VCR OWNERS, BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: VCR Owners who rented or bought cassettes	(202)	(66)	(70)	(66)
Decided by browsing	59%	62%	67%	46%
Had seen before	6	8	7	2
Not seen before but knew ahead of time	31	27	23	45
No answer	4	3	3	7
Total	100%	100%	100%	100%

Note: All bases unweighted.

OFF-AIR RECORDING OF PROGRAMS, SPORTSCASTS OR FILMS IN LAST WEEK AMONG VCR OWNERS, BY FREQUENCY OF MOVIE GOING

	Total	Frequent Movie Goers	Infrequent Movie Goers	Not in Last Year
Base: VCR Owners	(278)	(85)	(95)	(98)
Recorded	39%	43%	32%	42%
Did not	60	57	66	57
No answer	1	-	2	1
Total	100%	100%	100%	100%

Note: All bases unweighted.

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5/86

Research Report

Key Facts About

Newspapers and Advertising

1986

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

Key Facts About

Newspapers and Advertising

1986

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports are designed to promote the efficient use of the newspaper medium for the advertising and marketing needs of individual companies.

April 1986

Newspaper Advertising Bureau, Inc.

How To Use "Key Facts"

The main purpose of this report compiled from many sources is to answer some of the most frequently asked questions about newspapers and advertising.

The report is designed mainly as a reference source, not as an account to be read through page by page. To maximize its reference value the table of contents organizes specific items of information under a few broad headings such as "Advertising Cost" and "Newspaper Circulation."

For example, if one needs information on daily newspaper reach and frequency, this come under the general heading of "Newspaper Readership," where it is listed as "Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration."

The scope of the material is necessarily limited. For answers to other questions about newspapers and advertising, consult the heading "NAB Telephone Directory."

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NAB Telephone Directory

Ad readership	Stu Tolley	704-4562
Advertising expenditures	Jim Conaghan	704-4558
Advertising rates	Jim Conaghan	704-4558
Automotive sales	Val Corradi	(313) 642-9200
CAN DO	Susan Lorenzana	704-4555
Color (ROP)	Charles Kinsolving	704-4544
Co-op sales (NCN)	Frank Hennessey	(312) 644-1290
Coupon information	Chuck Lehman	704-4564
Food supermarkets	Dick Neale	704-4540
Information center	Ann Brady, Susan Hyer	704-4549
Inserts, preprints	Jack Aldinger, Ted Knecht	704-4520/1
Intermedia cost estimates	Uldis Grava	704-4550
Marketing services	Uldis Grava	704-4550
Membership information	Bill Solch	704-4530
National sales	Mac Morris	704-4503
Newspaper circulation	Jim Conaghan	704-4558
Newspaper features/sections	Chuck Lehman	704-4564
Newspaper readership	Chuck Lehman	704-4564
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New technology	Charles Kinsolving	704-4544
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Public relations	Jim Dunaway	704-4547
Real Estate classified	Tony Marsella	704-4516
Recruitment advertising	Ira Gordon	704-4515
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Standard panels	Tom Fitzpatrick	704-4551
Survey research	Chuck Lehman	704-4564
Total market coverage	Jack Aldinger	704-4521

(Unless otherwise stated, area code is 212)

New York Office	(212) 921-5080
Chicago Office	(312) 644-1290
Detroit Office	(313) 642-9200
Georgia Office	(404) 949-4833
Los Angeles Office	(213) 480-0452
San Francisco Office	(415) 981-8118

NEWSPLAN: Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

Discounts--Lower cost for the advertiser

By planning ahead, you can earn discounts from 10% to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space--in column inches or modular units--equals 6 pages, 13 pages or 52 pages. Discounts at these page levels are now in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

SAUs^{TM} - Simplified specs for the creative department

Thanks to Standard Advertising Units accepted by 1,594 daily newspapers (98% of total circulation) one finished mechanical now covers all the newspapers in your schedule in most cases. (See pages 4, 5 and 6 for more details.)

CAN DO--Better audience data for marketers and planners

CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, down to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an*IMS subscriber or through NAB at cost.

For more information on NEWSPLAN, call Mac Morris at (212) 704-4503.

CAN DO

The Newspaper Advertising Bureau's CAN DO program can:

- produce detailed audience data for any list of newspapers
- provide data customized to any geographic or selected demographic definition
- calculate reach, frequency and frequency distribution estimates
- allow media mix analyses through IMS data base for other media
- deliver data output via an on-line computer system

CAN DO data are available for every daily and Sunday newspaper in the United States.

CAN DO uses county building blocks to estimate audiences for all MSAs, ADIs, DMAs or customized areas constructed on whole county lines. And CAN DO provides estimates for the most important audience breaks -- age, sex, income and household size.

If you wish to provide us with the total cost per insertion, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information contact Susan Lorenzana at (212) 704-4555.

Standard Advertising Units (SAUs)™

The Standard Advertising Unit system simplifies the production and placement of newspaper advertising. The expanded SAU™ system introduced on July 1, 1984 has received the endorsement of AAAA, ANPA, INAME, NAB and other organizations. Newspapers accepting SAUs represent 99% of total U.S. daily circulation.

Broadsheet newspapers in full compliance with the system have a 6-column format for display advertising, a 13-inch printed page and a standard column width of 2-1/16 inches. Measurement and billing of advertising is based on the standard column inch. Most tabloids have adopted a 5-column format with the same column width as broadsheets. (The expanded SAU™ format chart on page 5 depicts 53 of the 57 advertising sizes developed. These include the N size for short cut-off tabloids. The remaining four sizes are all double truck as noted on the page.)

For more information or a full-scale SAU™ format chart, call Charles Kinsolving at (212) 704-4544.

(Effective July 1, 1984)

The Expanded SAU™ Standard Advertising Unit System

Depth in Inches	1 COL. 2-1/16"	2 COL. 4-1/4"	3 COL. 6-7/16"	4 COL. 8-5/8"	5 COL. 10-13/16"	6 COL. 13"
FD*	1xFD*	2xFD*	3xFD*	4xFD*	5xFD*	6xFD*
18"	1x18	2x18	3x18	4x18	5x18	6x18
15.75"	1x15.75	2x15.75	3x15.75	4x15.75	5x15.75	
14"	1x14	2x14	3x14	4x14	N 5x14	6x14
13"	1x13	2x13	3x13	4x13	5x13	
10.5"	1x10.5	2x10.5	3x10.5	4x10.5	5x10.5	6x10.5
7"	1x7	2x7	3x7	4x7	5x7	6x7
5.25"	1x5.25	2x5.25	3x5.25	4x5.25		
3.5"	1x3.5	2x3.5				
3"	1x3	2x3				
2"	1x2	2x2				
1.5"	1x1.5					
1"	1x1					

13"

1 Column 2-1/16"
2 Columns 4¼"
3 Columns 6-7/16"
4 Columns 8⅝"
5 Columns 10-13/16"
6 Columns 13"

Double Truck 26¾"
(There are four suggested double truck sizes:)

13xFD*	13x18
13x14	13x10.5

*FD (Full Depth) can be 21" or deeper. Depths for each broadsheet newspaper are indicated in the Standard Rate and Data Service. All broadsheet newspapers can accept 21" ads, and may float them if their depth is greater than 21".

Tabloids: Size 5 x 14 is a full page tabloid for long cut-off papers. Mid cut-off papers can handle this size with minimal reduction. The N size, measuring 9⅜ x 14, represents the full page size for tabloids such as the New York Daily News and Newsday; and other short cut-off newspapers. The five 13 inch deep sizes are for tabloids printed on 55 inch wide presses such as the Philadelphia News. See individual SRDS listings for tabloid sections of broadsheet newspapers.

Newspaper Advertising Bureau, Inc.
485 Lexington Avenue, New York, New York 10017 (212) 557-1800

Printed in U.S.A. 11/83

Fractional Broadsheet Pages: Column Inch Equivalents, With Standard Advertising Unit™ Options

Full page = 126 column inches

6 x 21 (FD)

Two-thirds page = 84 column inches

4 x 21 (FD)
6 x 14

Half page = 63 column inches

3 x 21 (FD)
4 x 15.75
6 x 10.5

One-third page = 42 column inches

2 x 21 (FD)
3 x 14
4 x 10.5
6 x 7

Quarter page = 31.5 column inches

2 x 15.75
3 x 10.5

One-sixth page = 21 column inches

1 x 21 (FD)
2 x 10.5
3 x 7
4 x 5.25

One-eighth page = 15.75 column inches

1 x 15.75
3 x 5.25

NAB Services: New Technology and Color

The oldest advertising medium in the United States is one of the most advanced in technological applications. Newspapers have launched a variety of electronic information services. Computerization and satellites have transformed every aspect of newspaper production. And electronic pressroom equipment is revolutionizing run-of-paper (ROP) color reproduction.

The Marketing/New Technology department works closely with advertisers, agencies and newspapers to develop programs to make newspapers a more attractive, more economical, and easier-to-buy medium. One such program is the Expanded Standard Advertising Unit^{TM} program which has been in use since July, 1984. The department is now focusing on improving ROP color reproduction and the standardization of newspaper special sections (i.e., TV logs).

The department also works closely with the Technical Committee of the ANPA, the 4A's and other organizations to track key developments in the new technologies, and their implications for the newspaper business.

Particular areas of interest of the department include:

Standardization
ROP Color
Satellite Transmission (AD/SAT)
Electronic Information Services
Public Access Videotex
Personal Computer Market
Cable TV

For more information on the Marketing/New Technology department activities, call Charles Kinsolving at (212) 704-4544.

ROP Color: Availability and Premiums

The great majority of newspapers offer ROP color advertising. In the 316 MSA markets, SAU^{TM} quarter-page ads in BW&1C can reach 68% of the total weekday circulation. Full-page ads in BW&3C can reach 89% of the total circulation.

Cumulative Percent of Total Circulation Represented by Daily Newspapers Offering ROP Color[a]

	Accept SAU Quarter-Page Ad			Accept SAU Full-Page Ad		
	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
Top 50 MSAs	58.8%	50.9%	49.2%	91.4%	86.1%	83.1%
Top 75 MSAs	60.7	52.5	50.6	92.7	87.5	84.7
Top 100 MSAs	62.3	53.8	52.0	93.4	88.5	85.9
Top 200 MSAs	66.5	59.3	57.8	94.5	90.4	88.2
All 316 MSAs	68.2	61.6	60.2	95.0	91.2	89.2

a) All daily newspapers with all least .05 ratio of circulation to households, or more than 25,000 circulation in the MSA.

Percent Color Premium Above Black and White Cost for Newspapers Offering ROP Color

	SAU Quarter Page			SAU Full Page		
MSA Rank	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
1 - 100	41%	55%	65%	12%	17%	20%
101 - 200	47%	68%	85%	13%	18%	22%
201 - 316	47%	71%	94%	12%	18%	24%
Total 316	43%	60%	74%	12%	17%	21%

Sources: ANM Circulation '83/'84; SRDS, July 1984. Prepared by Newspaper Advertising Bureau.

NAB's One-Order/One-Bill Newspaper Placement Service

This service is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper ROP or insert program, including costs, specifications and availabilities. For estimates and information, call Jack Aldinger or Ted Knecht at (212) 704-4520/21. They will handle all paper work, make reservations, issue insertion orders, provide proof-of-performance tearsheets and forward payment to every newspaper on the schedule, billing you on one invoice. Feel free to use this valuable service.

Free-Standing Insert Options

Today inserts can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 59,000,000 daily and 56,000,000 Sunday. Over 50% of all Sunday editions can distribute an insert in less than their full-run circulation, and more than 75% will accept a product sample attached to an insert. A similar proportion will accept an envelope, either empty or containing inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded, to 11" x 13", or as small as 5" x 7". Formats are equally varied: from a single page to a booklet of 96 pages or more. Inserts can be long or short and can include flaps, gatefolds, reply cards, coupons, perforations, fragrances, etc. Inserts can be printed on all types of paper from ordinary newsprint to super-coated card stock.

Newspaper Co-op Network (NCN)

With just one call to Newspaper Co-op Network, manufacturers and advertising agencies can easily place dealer listing co-op ads in any number of markets. Through NCN, you can coordinate your local message with your national brand awareness advertising--and still include local dealer listings in each market. You place only one order and get one bill--NCN DOES ALL THE WORK!

NCN is a total marketing package that dramatically increases vertical movement. Here are ten of NCN's unique advantages:

FACT 1 One Order/One Bill makes newspapers easy to use for co-op and eliminates the hassle of multiple orders and invoices.

FACT 2 NCN is cost efficient--It eliminates administration costs and insures the best possible rates available for dealer list co-op advertising.

FACT 3 Stimulates local retailer involvement and produces new retail single-signature advertising.

FACT 4 Flexibility--Tailors newspaper coverage to your needs for any combination of regular or test markets.

FACT 5 Creative Control--Advertiser controls both graphics and content.

FACT 6 Guaranteed Timing--Direct placement when and where you want it.

FACT 7 Localized Monitoring--Provides a new measurement tool. National Sales Manager now evaluates local market dealer penetration.

FACT 8 Customization--Dovetails ad coverage with local representatives' sales areas or distributor/wholesaler territories.

FACT 9 Specialization--Trouble-shooting capability to solve immediate marketing problems, i.e., excess inventory, new product test and competitive threat, market by market.

FACT 10 Free Sales Help!--NCN's newspaper co-op managers act as an extension of your own sales force. (Newspapers have more than 26,000 retail sales people in the field.)

Best of all, NCN WORKS. Ask us for success stories. For more information on NCN, call Frank Hennessey at (312) 644-1295.

Where to Obtain Rate Information

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Media Analysis Unit of NAB. Contact Jim Conaghan at (212) 704-4558.

Through NAB's NEWSPLAN, over 1,000 newspapers with more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP column inches or modular units equal to six or more pages per year. For more information, contact Mac Morris at (212) 704-4503.

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 704-4521 or Ted Knecht at 704-4520.

Among the Media Analysis Unit reports that include rate information are the following:

MSA METROPOLITAN MARKETS BY HOUSEHOLDS (316 MSAs)

United States Markets ranked by number of households in MSA. Lists all newspapers with a least .05 ratio of circulation to households or more than 25,000 circulation. Includes circulation-to-household ratios; metro and total circulation; inch rates; and cost of SAU quarter page, half page and full page. Published separately for weekday and Sunday/weekend editions.

ADI MARKETS BY HOUSEHOLDS (212 ADIs)

Comparable information, ranked by number of households in Area of Dominant Influence rather than by Metropolitan Statistical Area.

CUMULATIVE CIRCULATION AND RATES OF DAILY NEWSPAPERS IN 316 MSAs NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET.

(For complete list of annual reports prepared by Economic and Media Analysis Unit of NAB, see page 36.)

How Can Intermedia Advertising Costs Be Estimated?

Media planners often need to compare the cost of various advertising media. The best approach to the problem is to use common universe standards as a media base. The Designated Market Area* (DMA) is a geographic unit that lends itself to this purpose, since the 212 DMAs account for the total land area of the United States.

Intermedia cost estimates can be expressed in terms of households or standard demographic age/sex cells because current figures are available for both broadcast and newspapers.

Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure of potential exposure is Gross Rating Points (GRPs).

The table on page 13 illustrates how GRPs can be used for intermedia comparisons, in this case between TV and newspapers. This table shows marginal differences in the household universes for newspapers and TV because Nielsen household estimates are 98% of 1985 forecasts (year ahead) whereas newspaper DMAs are 100% of Market Statistics 1984 updates (year past) of the 1980 census.

This table compares the cost-per-household GRP of the quarter-page newspaper space unit (31.5 column inches) with the 30-second commercial unit, most favored by TV advertisers. The TV daypart used is prime because this is the time period offering a large dual audience, most comparable in size and composition to newspapers.

The figures shown represent a conservative estimate at national open rates, used in the initial stage of setting up a media plan. A final plan specifying particular TV programs and individual newspapers (with local or earned volume discounts) would show better efficiencies in cost-per-thousand audience delivery.

For further details contact Uldis Grava (212) 704-4550.

*This statement applies to the Area of Dominant Influence (ADI) as well.

Newspaper vs. Television: Top 20 Markets
HH Universe and Cost/HH GRP Comparison
(Oct-Dec 1985)

		30 sec. Primetime Spot TV		31.5 inches Daily Newspapers	
DMA Market		HH (000)	Cost/HH GRP	HH (000)	Cost/HH GRP
1.	New York	6,705	$ 571	6,844	$ 575
2.	Los Angeles	4,380	593	4,499	375
3.	Chicago	3,017	314	3,063	290
4.	Philadelphia	2,518	251	2,551	215
5.	San Francisco	2,065	281	2,147	220
6.	Boston	1,960	285	1,991	201
7.	Detroit	1,662	181	1,679	196
8.	Washington, DC	1,552	178	1,575	159
9.	Dallas-Ft. Worth	1,540	281	1,568	162
10.	Cleveland	1,424	116	1,442	100
	TOTAL: Top 10	26,823	$3,051	27,359	$2,493
11.	Houston	1,391	$ 279	1,422	110
12.	Pittsburgh	1,230	131	1,243	136
13.	Atlanta	1,187	190	1,205	111
14.	Seattle-Tacoma	1,178	195	1,217	107
15.	Tampa-St. Petersburg	1,163	134	1,181	74
16.	Miami	1,163	231	1,182	145
17.	Minneapolis-St. Paul	1,157	149	1,174	125
18.	St. Louis	1,045	118	1,060	105
19.	Denver	993	129	1,018	90
20.	Sacramento	890	107	917	92
	TOTAL: Top 20	38,220	$4,714	38,978	$3,588

Sources: Media Market Guide, 4th Qtr. 1985; PEP Media Database, Fall 1985

How Newspaper Advertising Works

The daily newspaper is a unique advertising medium. Readers think of the newspaper mainly as a useful source of information. They are aware of the difference between editorial content and advertising, but in their everyday use of the newspaper they don't pay much attention to this distinction. The most common way of reading the paper is to start with the front page and go through the paper page by page, scanning it for articles and ads that look "interesting."

Individual readers find different kinds of content "interesting," and the human eye's efficiency as a scanning device makes it easy for readers to find the articles and ads they want to read. As a result, interest in newspaper ads is highly correlated with buying interest:

Average Interest Level in 339 Newspaper Ads, by Prospect Status

Prospects:	Interest in Ad
I ("hottest" prospects)	90%
II	78
III	48
Non-prospects:	
IV	48%
V	33
VI ("coldest" non-prospects)	11

(For further details, see "How Newspaper Ads Select Customers," Newspaper Advertising Bureau, Inc., 1979.)

This close link between prospect status and interest in advertising may seem self-evident, but it does not necessarily hold for other media in which advertisers depend on novelty, humor or the personality of the presenter to attract the consumer's attention.

A Few Common Newspaper Terms

Broadsheet:	A "standard" or large-size newspaper. As of July 1, 1984, most broadsheet dailies adopted a uniform 13-inch printed page width and a full depth of 21" or deeper, up to 22-1/2".
Circulation:	The number of copies sold or distributed. For the more than 90% of weekday circulation audited by the Audit Bureau of Circulation, the term always denotes paid circulation.
Color scanner:	Electronic equipment that automatically produces separations for ROP process (or "full") color.
Column inch:	Space measurement one column wide and one inch deep. (See "Standard Advertising Units" pp 4, 5.)
Double truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Facsimile transmission:	The electronic transmission of a page image (usually to printing plants at other sites).
Front-end system:	A total computer system for text entry, editing, formatting and/or billing, for editorial, display advertising and/or classified advertising.
Newsprint:	The uncoated, machine-finished paper on which newspapers are printed.
Pagination system:	A computerized makeup system for composing whole pages of type, line art and halftones.
Press run:	Total number of copies printed per issue.
ROP:	ROP (or "run-of-paper") is a term generally applied to ads that appear on a newspaper page (as distinguished from preprints or inserts).
Scotch double truck:	A single unbroken advertisement on two facing pages bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper with a smaller page size than a broadsheet. A full tabloid page is usually 14 inches deep. The width varies from 9-3/8" ("short cut-off") to 10-13/16" ("long cut-off").

Daily Newspaper Audience
(Average Weekday)

	Number (in 000s)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	108,812	64%	100%
By Sex:			
Men	53,718	67%	49%
Women	55,094	62	51
By Age:			
18-24 years	15,796	55%	14%
25-34 years	23,467	59	22
35-44 years	20,382	68	19
45-54 years	15,512	70	14
55-64 years	16,022	73	15
65 years or older	17,633	67	16
By Education:			
College graduate	22,455	78%	21%
1-3 years college	20,709	70	19
High school graduate	44,227	66	40
Some high school or less	21,421	49	20
By Household Income:			
$50,000 or more	16,865	80%	15%
$35,000 or more	38,356	75	35
$25,000 - $34,999	20,997	66	19
$20,000 - $24,999	11,723	63	11
$15,000 - $19,999	10,033	63	9
$10,000 - $14,999	14,009	59	13
Under $10,000	13,693	48	13
By Occupation:			
Professional, manager	20,266	77%	19%
Technical, clerical, sales	21,825	69	20
Precision, craft	7,856	61	7
Other employed	17,849	57	16
Not employed	41,017	61	38

Source: SMRB, 1985 Study of Media & Markets

NOTE: Because of a change in SMRB's method of estimating average weekday audience, estimates may not be comparable to those for earlier years.

Sunday/Weekend Newspaper Audience
(Average Sunday/Weekend)

	Number (in 000s)	Percent of Population (Coverage)	Percent of Audience (Composition)
Total Adults	110,255	65%	100%
By Sex:			
Men	52,879	66%	48%
Women	57,376	64	52
By Age:			
18-24 years	16,862	59%	15%
25-34 years	25,837	64	23
35-44 years	20,770	69	19
45-54 years	15,462	69	14
55-64 years	15,133	69	14
65 years or older	16,192	61	15
By Education:			
College graduate	23,320	81%	21%
1-3 years college	21,439	72	20
High school graduate	45,246	67	41
Some high school or less	20,250	46	18
By Household Income:			
$50,000 or more	17,326	83%	16%
$35,000 or more	40,633	80	36
$25,000 - $34,999	22,134	70	20
$20,000 - $24,999	12,160	66	11
$15,000 - $19,999	9,644	60	9
$10,000 - $14,999	12,811	54	12
Under $10,000	12,871	45	12
By Occupation:			
Professional, manager	21,232	80%	19%
Technical, clerical, sales	22,473	71	21
Precision, craft	7,706	60	7
Other employed	18,047	58	16
Not employed	40,797	61	37

Source: SMRB, 1985 Study of Media & Markets

Local Market Newspaper Audience Data

Through its CAN DO program, Newspaper Advertising Bureau supplies audience estimates at cost for any combination of daily and Sunday newspapers. Classifications available include age, sex, household size and income. For information contact Susan Lorenzana at (212) 704-4555.

Advertisers who need local audience data for other standard demographic classifications can often get this information by contacting newspapers directly.

The following list is a sample of research companies that conduct syndicated multi-market newspaper research or individual market studies of readership or reader attitudes.

Newspaper Advertising Bureau does not endorse any specific companies or comment on their professional qualifications. The presence of a particular company name on this list should not be taken as an endorsement, nor the absence of some other name as evidence of disapproval. This is merely a sample of companies conducting newspaper research. For a more complete list of research companies, see the American Marketing Association GreenBook.

Syndicated Multi-Market Studies

Company Name:	No. of Mkts.	Contact:	Telephone:
Mediamark Research	10	Alain Tessier	(212) 599-0444
Simmons-Scarborough	56	John Polich	(212) 685-2225
Scarborough Research	10	Harold Israel	(212) 736-1990

Individual Newspaper Studies

Company Name:	Contact:	Telephone:
Belden Associtesz	Deanne Termini	(214) 522-8620
Brehl & Associates	Mary Toppmeyer	(516) 466-6882
Creative Research Services	William Ash	(212) 962-6150
Market Opinion Research	Frederick Currier	(313) 963-2414
MORI Research	Kristen McGrath	(612) 881-2380
Omni-American	John Brodbeck	(305) 746-3335
Response Analysis Corp.	Diane Schrayer	(609) 921-3333
RHM Research	Richard Hochhauser	(201) 797-9600
Senft Research Associates	Henry Senft	(516) 944-6888

Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration

	Number of Weekday Issues:			
One Issue Reach:	Two	Three	Four	Five
15% Reach	19%	22%	23%	25%
Avg. Freq.	1.6	2.1	2.6	3.1
20% Reach	26%	29%	31%	33%
Avg. Freq.	1.6	2.1	2.6	3.1
25% Reach	32%	36%	39%	41%
Avg. Freq.	1.6	2.1	2.6	3.1
30% Reach	38%	43%	46%	48%
Avg. Freq.	1.6	2.1	2.6	3.1
35% Reach	45%	50%	54%	56%
Avg. Freq.	1.6	2.1	2.6	3.1
40% Reach	51%	57%	61%	64%
Avg. Freq.	1.6	2.1	2.6	3.1
45% Reach	58%	64%	68%	71%
Avg. Freq.	1.6	2.1	2.6	3.2
50% Reach	64%	71%	75%	78%
Avg. Freq.	1.6	2.1	2.7	3.2
55% Reach	70%	78%	82%	85%
Avg. Freq.	1.6	2.1	2.7	3.2
60% Reach	77%	84%	88%	91%
Avg. Freq.	1.6	2.1	2.7	3.3

Note: These estimates assume a turnover rate of 28%, which is average for metropolitan newspapers. Turnover rates, the ratio of the two-issue reach to the one-issue reach, range from about 16% to 36%. Since the reach and frequency patterns for individual newspapers vary, these estimates should be used only in the absence of local data.

Source: Audits and Surveys, Inc.;
Newspaper Advertising Bureau

Editorial Environment: Newspaper Sections and Features

The newspaper provides varied editorial environments that meet the needs of almost any advertiser. On request, more than eight out of ten U.S. newspapers will position advertising near appropriate content, usually without charge.

A 1983 survey of newspapers enables NAB to supply a computerized list of newspapers that regularly carry a specific section or feature. This list, alphabetized by state and by city within state, tells which days of the week the section or feature runs, as well as the newspaper's general policy on positioning.

SECTIONS on which information is available include:

Business, finance
Entertainment
Fashion
Food
Home
Lifestyle, women
Science
Sports
TV, radio
Travel

FEATURES (partial listing):

Advice on personal finance
Astrology
Automotive
Beauty
Best food buys

Books
Business, Financial
Career advice
Child care
College

Computers (personal)
Diet, nutrition
Fashion, men
Fashion, women

Fashion, teenage
Games and puzzles
Gardening
Health and medical
Home building, repair

Home furnishings
Movie timetable
Music, records, tapes
Op Ed page
Outdoors: camping, etc.

Personal advice
Pets
Photography
Real estate

Recipes
Religion
Restaurants
Retirement, Social Security

Science, technology
Sewing patterns
Sports (spectator)
Sports (participant)
Stamps, coins

Theatre
Travel and resort
Weather map
Wine

For information, call Chuck Lehman at (212) 704-4564.

Number of Daily and Sunday Newspapers in the United States

Year	Morning	Evening	All Day	Total Daily	Sunday
1981	379	1,323	30	1,732	755
1982	401	1,277	33	1,711	768
1983	417	1,255	29	1,701	772
1984	431	1,230	27	1,688	783

Circulation of Daily and Sunday Newspapers in the United States
(in 000's)

Year	Morning[1]	Evening[1]	Total Daily[1]	Sunday
1981	30,552	30,878	61,431	55,180
1982	33,174	29,313	62,487	56,260
1983	33,842	28,802	62,644	56,747
1984	35,425	27,657	63,082	57,574

[1] Circulation of all-day newspapers is apportioned between "Morning" and "Evening."

1984 Newspaper Data for Canada

	Morning[1]	Evening[1]	Total Daily[1]	Sunday/ Weekend
Number of newspapers	25	91	114	27
Circulation (in 000's)	2,574	2,766	5,340	3,688

[1] Three all-day newspapers counted both in AM & PM columns, but only once in the total. Circulation for these papers is equally divided between AMs and PMs.

How Much Do People Spend to Read Daily and Sunday Newspapers?
1984 Estimate of Annual Expenditures in the United States
(in thousands of dollars)

Weekday	Sunday	Total
$5,093,394	$2,274,764	$7,368,158

Sources: SRDS; Editor and Publisher Yearbook; ABC; CARD.
Prepared by Newspaper Advertising Bureau, Inc.

Readers-Per-Copy Estimates for Total U.S.

	Weekday	Sunday/Weekend
Adults	2.15	2.20
Men	1.10	1.06
Women	1.05	1.14

Sources: Estimate by Newspaper Advertisng Bureau, based on 1985 SMRB Study of Media and Markets; Editor and Publisher Yearbook, 1985.

Weekday Newspaper Readers-Per-Copy in Top 25 ADIs

Top 25 ADIs	2.77
Markets 1-5	2.93
Markets 6-10	2.64
Markets 11-25	2.64

Source: Simmons - Scarborough Syndicated Research Associates, 1985.

Average Weekday Coverage of Professionals and Managers
(Total U.S.)

	Total (in 000s)	Daily Readers (in 000s)	Percent of Total
Total professionals & managers	26,470	20,266	77%
Individual employment income of $35,000 & over	7,640	6,575	86%
College graduate	16,951	13,379	79%
Involved in computers, EDP equipment purchase decisions.	2,025	1,693	84%

Source: 1985 SMRB Study of Media and Markets.

The size of the daily audience varies little over the five weekdays...

Index of Daily Newspaper Readership by Adults

	Average Weekday	Monday	Tuesday	Wednesday	Thursday	Friday
Total adults	100	98	100	102	100	101
Men	101	99	101	102	102	100
Women	99	97	98	102	98	101

Source: Audits & Surveys, Inc., 1982

...mainly because most newspaper readers are subscribers.

How Daily Newspaper Read Yesterday Were Obtained

Subscribe, delivery	74%
Bought single copy	18
Family member brought home	3
Obtained otherwise	5

Source: Audits & Surveys, Inc., 1982

And newspaper reach is virtually constant throughout the year.

Index of Month-by-Month Circulation[a]

	J	F	M	A	M	J	J	A	S	O	N	D
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
Sun/wknd	100	101	101	101	100	99	98	98	100	101	101	100

a) Average month circulation = 100

Source: Media General, Inc., survey of ICMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

The Reading of Daily Newspapers:

Average Number of Times Read or Looked At and Average Time Spent Reading Dailies Yesterday by Day of the Week and Number of Papers Read*

	Avg. No. Times Read/Looked at Newspaper	Avg. Time Spent Reading (Minutes)
Monday		
Read 1 daily	1.5	38
Read 2+ dailies	3.0	61
Tuesday		
Read 1 daily	1.5	40
Read 2+ dailies	2.7	59
Wednesday		
Read 1 daily	1.5	38
Read 2+ dailies	3.1	59
Thursday		
Read 1 daily	1.6	42
Read 2+ dailies	3.2	72
Friday		
Read 1 daily	1.6	39
Read 2+ dailies	2.8	58
All Yesterday Readers (N = 1,352)	1.8	44

*Audits and Surveys, 1982: National sample of 1,979 adults interviewed in person about "yesterday's" newspaper reading. Interviews were equally distributed across the week, Tuesday-Saturday; "yesterday reading" behavior was probed for three dayparts separately.

Types of Daily Newspaper Pages or Sections Usually Read
(Total Adults, by Sex)

	Percent of Weekday Audience:		
	Adults	Males	Females
Usually read every page	64%	65%	63%
Read certain pages or sections	36	35	37
Business, finance	78	80	76
Classified	78	78	78
Comics	77	76	78
Editorial page	78	77	79
Entertainment	81	78	84
Food, cooking	78	72	84
General news	92	91	93
Home improvement, gardening	74	71	78
Sports	78	86	71
TV, radio listings	76	74	78
Projected base: Average Weekday Audience (in 000s)	(108,812)	(53,718)	(55,094)

Source: SMRB, 1985 Study of Media & Markets

Estimating Ad Readership

Page opening is the accepted measure of opportunity for advertising exposure. Other measures, such as Starch "Noted" scores, are also widely used as indications of a specific ad's attention value. It is well known that any such measure varies with the nature of the advertised product, size of ad and creative treatment.

Only a readership survey can provide reliable clues to a specific ad's attention value, but in the absence of a survey, average reported readership for a large number of ads may be useful. Average reported readership figures also provide a useful benchmark for evaluating the performance of individual measured ads.

Percent of Ads Read on Opened Pages
(by size of ad)

Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%

Source: Audits & Surveys, Inc., 1982. (Unweighted base is 16,605 ads of five column inches or more appearing on randomly selected sample pages of newspapers read "yesterday." For more details, see "Newspaper Pages, Ads and Readers".)

Multiple Insertions: How Advertising Exposure Accumulates

It is virtually impossible to obtain direct measures of the number of people reached by multiple ad insertions.

However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, then it is possible to estimate the cumulative effect of multiple insertions.

The first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Average for Single Insertion:	Number of ads in Campaign:					
	Two	Three	Four	Five	Six	Seven
20% net reach:*	30%	38%	45%	50%	55%	58%
avg. freq:	1.3	1.6	1.8	2.0	2.2	2.4
25% net reach:	37%	46%	53%	59%	63%	66%
avg. freq:	1.4	1.6	1.9	2.1	2.4	2.6
30% net reach:	43%	53%	61%	67%	71%	74%
avg. freq:	1.4	1.7	2.0	2.2	2.5	2.8
35% net reach:	50%	60%	68%	74%	78%	80%
avg. freq:	1.4	1.8	2.1	2.4	2.7	3.1
40% net reach:	55%	65%	73%	79%	83%	85%
avg. freq:	1.5	1.8	2.2	2.5	2.9	3.3
45% net reach:	60%	70%	78%	84%	87%	89%
avg. freq:	1.5	1.9	2.3	2.7	3.1	3.5
50% net reach:	65%	75%	83%	88%	90%	91%
avg. freq:	1.5	2.0	2.4	2.9	3.3	3.8

*Net reach=percent of exposed audience reached one or more times.

(For more details see, "Yardstick of Accumulative Newspaper Ad Readership," Newspaper Advertising Bureau, Inc.)

Ad readership varies little whether the ad appears on the left of right side of the page...

	Left	Right
Men	99	102
Women	100	100

...above or below the fold...

	Above Fold	Below Fold
Men	99	101
Women	100	100

...or in the gutter or outside position.

	Gutter	Outside
Men	100	101
Women	101	100

But...editorial environment can affect performance.

Advertisements for Products of Interest to Both Men and Women

Type of Page:	Men	Women
Sports	114	49
Food, home	63	101
General news	100	101

NOTE: Index--Starch "Noted" score for average ad=100

Source: MMN Starch studies of 32,000 ads.

Most Believable Advertising Medium

	Percent Selecting
Newspaper	48.5%
Television	19.3
Direct Mail	12.1
Magazines	11.6
Radio	3.7
No answer	4.8

Source: Home Testing Institute, 1984

Percent Who Look Forward to Advertising in Five Media

	Percent*
Newspaper ads	60%
Mail ads	28
Magazine ads	20
Television commercials	7
Radio commercials	6

*Total exceeds 100% because of multiple mentions.

Source: Response Analysis Corporation, 1982

Percent of This Week's Purchases Not Planned Last Week

	Percent Unplanned
Women's wear (average)	86%
Men's wear	82
Children's, infants' wear	85
Stationery, gift items	76
Major appliances, TV stereo	88
Furniture, furnishings	79
Household textiles, sewing items	85
Housewares and supplies	95
Sporting goods	85

Advertising Influence on Last Unplanned Purchase

	Saw or Heard Advertising		Source of Advertising
Total reporting unplanned purchase	41%	=	100%*
Newspaper			60%
Television			17
Direct Mail			15
Magazine			6
Radio			5
Something left at door			3
No answer			1

*Total exceeds 100% because of multiple answers.

Source: Response Analysis Corporation, 1982.

(For more details, see How America Shops and Buys, Newspaper Advertising Bureau, 1983.)

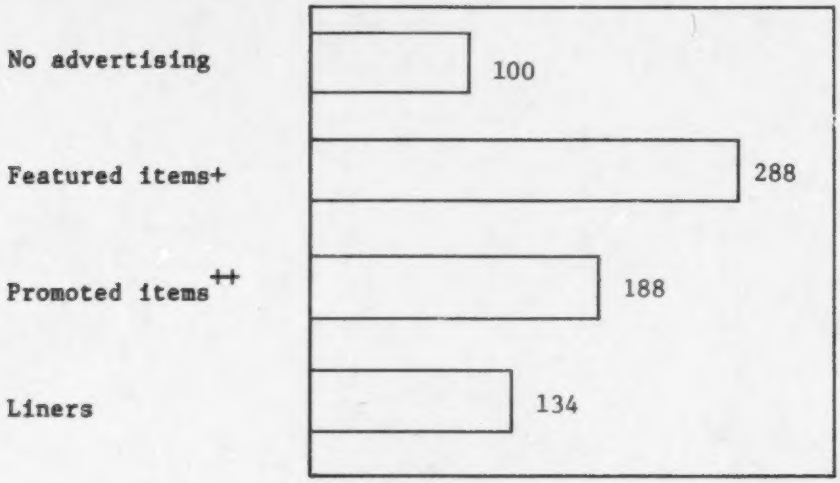
How Newspaper Advertising Affects Package Goods Sales

In 1980, computerized scanner records were used to analyze the effect of ad linage and price cuts on product movement. The analysis covered 479 items appearing in 20 ads from 17 stores. Unit and dollar sales were recorded for the week of the ad and two weeks before the ad (the base period).

Results show that, on average, newspaper advertising triples the volume of items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices doubles sales.

The movement of items advertised at regular prices is closely tied to the amount of advertising space given an item.

Sales Results For Items Advertised At Regular Prices



[+] Four square inches or more.

[++] Larger than a liner but less than four square inches.

Cents-Off Coupons

Newspapers continue to be the number-one medium for coupons.

Coupon Distribution Patterns

	1985	1984	1983
Newspapers	83.3%	82.1%	80.1%
Daily ROP	14.4	17.3	20.0
Co-op	9.2	10.0	12.2
Sunday Magazine	1.6	3.3	4.9
F.S.I. Sunday	47.4	42.7	36.6
Weekday	10.7	8.8	6.4
Magazines	8.1	8.5	10.0
Direct Mail	3.7	4.4	4.3
In/on Pack	4.9	5.0	5.6

Source: Nielsen Clearing House
(Figures do not include store coupons.)

Usage of Cent-Off Coupons from Newspapers by Female Homemakers

	Percent of	
	Female Homemakers	Coupon Users
Ever use cents-off coupons	64%	100%
Use coupons from newspapers	54%	85%
Heavy -- more than once a week	8	12
Medium -- once a week	19	30
Light -- less often	27	43

Source: SMRB, 1985 Study of Media and Markets

Advertising-to-Sales Ratios for Selected Retail Stores and Services (1984)

	Ad Dollars as Percent of Sales
Amusement & recreation services (misc.)	4.4%
Apparel & accessories stores	2.0
Auto dealers & gas stations	1.6
Automotive repair & service	2.5
Computer programs & software	2.2
Computer stores	3.7
Data processing services	1.8
Department stores	3.3
Drug & proprietary stores	1.6
Eating places	3.7
Educational services	4.3
Equipment rental & leasing	3.6
Finance services	4.2
Fuel & ice dealers	0.6
Furniture stores	7.1
Grocery stores	1.4
Hotels, motels	2.6
Household appliance stores	5.7
Insurance agents, brokers	0.8
Jewelry stores	6.2
Lumber & building materials	2.2
Mail order houses	15.3
Motion picture theaters	4.1
Personal credit institutions	1.6
Personal services	5.8
Radio & TV broadcasters	3.9
Real estate	1.8
Savings & loan associations	0.7
Shoe stores	2.0
Women's ready to wear	2.0

Source: Special analysis by Schonfeld and Associates of SEC data for 5,000 publicly owned companies, as reported in Advertising Age, July 15, 1985.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

Prepared by McCann-Erickson, Inc.

MILLIONS OF DOLLARS

MEDIUM	1981		1982		1983		1984	
Newspapers total	$16,528	27.4%	$17,694	26.6%	$20,582	27.1%	$23,522	26.8%
national	2,259	3.8	2,452	3.7	2,734	3.6	3,081	3.5
local	14,269	23.6	15,242	22.9	17,848	23.5	20,441	23.3
Magazines total	3,533	5.8	3,710	5.6	4,233	5.6	4,932	5.6
weeklies	1,598	2.6	1,659	2.5	1,917	2.5	2,224	2.5
women's	853	1.4	904	1.4	1,056	1.4	1,209	1.4
monthlies	1,082	1.8	1,147	1.7	1,260	1.7	1,499	1.7
Farm publications total	146	0.2	148	0.2	163	0.2	181	0.2
Television total	12,650	20.9	14,329	22.1	16,136	21.3	19,900	22.7
network	5,575	9.2	6,210	9.3	7,017	9.3	8,526	9.7
spot	3,730	6.2	4,360	6.6	4,796	6.3	5,373	6.2
syndicated barter	NA	NA	NA	NA	300	0.4	400	0.5
cable (national)	NA	NA	NA	NA	320	0.4	466	0.5
local	3,345	5.5	3,759	5.6	4,323	5.7	5,055	5.7
cable (local)	NA	NA	NA	NA	30	* * *	80	0.1
Radio total	4,230	7.0	4,670	7.0	5,210	6.9	5,813	6.6
network	230	0.4	255	0.4	296	0.4	316	0.3
spot	879	1.4	923	1.4	1,038	1.4	1,197	1.4
local	3,121	5.2	3,492	5.2	3,876	5.1	4,300	4.9
Direct Mail total	8,944	14.8	10,319	15.5	11,795	15.6	13,800	15.7
Business Papers total	1,841	3.1	1,876	2.8	1,990	2.6	2,270	2.6
Outdoor total	650	1.1	721	1.1	794	1.1	872	1.0
national	419	0.7	465	0.7	512	0.7	562	0.6
local	231	0.4	256	0.4	282	0.4	310	0.4
Miscellaneous total	11,908	19.7	13,113	19.7	14,297	18.8	16,530	18.8
national	6,334	10.5	7,067	10.6	7,331	9.6	8,586	9.8
local	5,574	9.2	6,046	9.1	6,966	9.2	7,944	9.0
Total national	33,890	56.1	37,785	56.8	42,525	56.1	49,690	56.6
Total local	26,540	43.9	28,795	43.2	33,325	43.9	38,130	43.4
GRAND TOTAL	$60,430	100.0%	$66,580	100.0%	$75,850	100.0%	87,820	100.0%

* * * Less than 0.1%   NA = Not available

Estimates include all costs: Time and talent, space and production.

Source: McCann-Erickson, Inc.

Prepared by: Newspaper Advertising Bureau, Inc.

Newspaper Advertising Expenditures*
(millions of dollars)

	National	Retail	Classified	Total
1974	$1,105	$ 4,563	$2,174	$ 7,842
1976	1,342	5,668	2,608	9,618
1978	1,541	7,023	3,649	12,214
1980	1,963	8,609	4,222	14,794
1982	2,452	10,390	4,852	17,694
1983	2,734	11,841	6,006	20,582
1984	3,081	12,784	7,657	23,522

* Production costs included.

Source: McCann-Erickson, Inc.,
NAB estimates for classified.

Newspaper Insert Advertising Volume

	Free-Standing Inserts (Card & Multi-Page) (millions)	Free-Standing Insert Revenue (thousands)
1975	15,800	NA
1977	20,101	$1,086,000
1979	27,132	1,776,604
1981	28,708	2,288,542
1983	35,727	3,095,000
1984	41,265	3,691,407

NATIONAL
ESTIMATED TABLOID (10 3/4" X 13") INSERT COSTS FOR ALL SUNDAY NEWSPAPERS PUBLISHED WITHIN PMSA

PMSA (TOP)	NUMBER OF NEWSPAPERS	TOTAL CIRCULATION	COST PER 1,000					
			2 PAGES	4 PAGES	8 PAGES	12 PAGES	16 PAGES	24 PAGES
10	46	15,581,700	$34.81	$35.39	$41.11	$45.93	$51.39	$60.80
25	105	24,838,310	35.45	36.20	40.77	45.25	50.54	59.12
50	167	33,777,940	35.25	36.49	41.72	46.69	51.80	60.16
75	221	39,422,120	34.84	36.18	41.70	47.13	52.37	61.02
100	259	42,812,100	34.84	36.20	41.66	47.11	52.22	60.97
150	323	47,531,780	34.85	36.36	42.09	47.58	52.68	61.22
200	384	50,707,550	35.03	37.07	42.49	47.90	52.82	61.33
250	427	52,360,480	35.18	37.30	42.74	48.17	52.97	61.42
315	488	54,386,640	35.37	37.59	43.04	48.45	53.14	61.51

Source: Newspaper Advertising Bureau, November 1985.

ANNUAL REPORTS PREPARED BY ECONOMIC & MEDIA ANALYSIS UNIT, RESEARCH DEPT.

1. Total advertising volume in the U.S., 1935 to present, (McCann-Erickson estimates).
2. Newspaper advertising expenditures, 1945 to present. National, Retail and Classified.
3. U.S. Daily and Sunday newspapers - 1945 to present - Number and Circulation.
4. How much do people spend to read daily and Sunday newspapers, 1945 - present.
5. National advertising expenditures in major media by classification.
6. Daily newspapers in 316 MSA's: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page, and SAU full page.
7. Daily newspapers in 212 ADI's: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page, and SAU full page.
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17. Newspaper groups - daily - 212 ADI's.
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19. Newspaper groups - Sunday - 212 ADI's.
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21. Daily and Sunday newspapers with zone edition.
22. Cities in the U.S. with two or more newspapers.
23. Newspapers in the U.S. not accepting beer, wine or liquor advertising.
24. Media Breakdown of U.S. agencies billing $30 million or more.
25. Newspapers not offering a 2% cash discount.

Inquiries: Research Department, (212) 921-5080, exts, 359 & 341.

NAB Research Reports

Item No.	AD READERSHIP	Member Prices
607	Frequent Fliers and Airline Ads (1984)	$ 4.00
557	Air Travel Study (1981)	4.75
549	Do Corporate Ads Get Read? Evidence from a Follow-up Study in 5 Cities (1980)	1.75
550	Does Corporate Advertising Get Read? (1980)	1.00
500	How Newspaper Ads Select Customers (1980)	2/1.00
504	Research Facts on Position, Timing and Creativity in Newspaper Advertising (1986)	1.50
503	The Effects of Placing Ads for the Same Product Category on the Same Page: A Field Experiment (1976)	3.00
507	Retail Inserts in Daily Newspapers: A 4-Market Readership Study (1976)	2.50
505	Creative Variables and Ad Readership (1975)	2.00
506	Readership of Coupon vs. No-Coupon Ads (1974)	1.00
554	Color in Newspaper Advertising: Is It Worth the Money? (1974)	1.50
511	Norms for the Readership of National Ads and an Analysis of the Readership Effects of Ad Size (1972)	2.00
512	A Comparison of the Readership of 7- vs. 8- Column National Ads (1972)	1.50
513	Editorial Context: Readership of Men's Interest Ads (Tires) on Sports Pages vs. General News Pages (1972)	1.00
514	A Summary of Research on the Form of Advertising: Layout, Type Size, Typefaces, Forms of Copy (1971)	1.00
515	Readership of Small Space National Ads in Newspapers (1968)	1.00
501	Yardstick of Accumulative Newspaper Ad Readership	2/1.00

NAB Research Reports (continued)

CLASSIFIED ADVERTISING

		Member Prices
608	Nurses' Attitueds Toward Job-Seeking and Recruitment Advertising (1984)	$ 4.50
606	Real Estate in the Eighties: A Study of Home Buyers and Sellers (1984)	4.00
597	Job Search and Recruitment Advertising Study: Engineers and Computer Professionals (1983)	5.00
517	A National Study of Classified Advertising Readership and Prospect Status (1980)	3.00
518	An Eight-Market Study of Recent New Home Buyers (1978)	2.75
520	Help Wanted Advertising: A National Mail Survey of New Job Holders (1977)	2.50
522	Classified Advertising: Readership and Use Among Purchasers of General Merchandise and Recreation and Leisure Items (1985)	3.00
523	Which Ad Pulled Better? Employment Classified Ads (1974)	1.00
524	Principles for Writing Effective Classified Ads for Private Homes (1968)	2.00

COMPETITIVE MEDIA

610	A Field Experiment of the Sales Effectiveness of Direct Mail, ROP and Inserts (1985)	3.00
593	National Study of Direct Mail: An Inventory of Household Mail and How it is Treated (1983)	7.50
581	Newspapers and Direct Mail: A Study of Advertising Believability (1982)	.50
526	Trends in TV Commercial Recall, 1965-1981: A Report on Three Surveys of Prime-Time Network Viewers (1981)	2.50

NAB Research Reports (continued)

COMPETITIVE MEDIA (continued)

		Member Prices
525	The Believability of Advertising in Five Media: Results from a Recent Nationwide Survey (1981)	$2.00
567	Movie Going in the Metropolis (1978)	2.75
527	Dailies, Shoppers and Pennysavers: A Four-Market Study of Readership and Attitudes (1978)	3.00
528	Direct Mail (1977)	2.00
529	A Three-City Survey of Recall of Outdoor Advertising (1976)	1.50

MISCELLANEOUS RESEARCH REPORTS

602	Key Facts About Newspapers and Advertising - 1986 (1986)	2.00
543	Women, Work and Markets of the 80's (1979)	4.50

NEWSPAPER READERSHIP

605	Estimating Daily Newspaper Reach and Frequency for Major Demographic Segments (1985)	3.00
601	The Readership of Newspaper Pages and Sections: Demographic Breakdowns (SMRB) (1985)	2.00
600	1985 Sunday/Weekend Newspaper Readership Demographic Tables for Total U.S., Top 100 Metros and Top 100 DMAs (SMRB) (1985)	3.00
599	1985 Daily Newspaper Readership Demographic Tables for Total U.S., Top 100 Metros and Top 100 DMAs (SMRB) (1986)	3.00

NAB Research Reports (continued)

		Member Prices
	NEWSPAPER READERSHIP (continued)	
538	Average Weekday and Average Sunday/Weekend Newspaper Coverage of Product and Service Users (1984)	$ 3.00
542	Newspaper Net Reach Estimator	1.00
	REPORTS ON SPECIFIC PRODUCTS AND SERVICES	
609	Wine Consumers' Sales Response to Advertising and Price Changes (1985)	3.00
607	Frequent Fliers and Airline Ads (1984)	4.00
606	Real Estate in the Eighties: A Study of Home Buyers and Sellers (1984)	4.00
604	The Automotive Aftermarket, 1984: A Study of Primary Car Maintainers (1984)	4.00
603	Demographic Characteristics of Frequent Movie-Goers (1984)	1.50
592	Food Shopping in One-Person Households (1983)	2.75
587	The Emerging New Food Shopper (1982)	3.50
558	Movie Going in the United States and Canada (1981)	2.50
557	Air Travel Study (1981)	4.75
561	Supermarket Shoppers' Reactions to Future Possibilities (1980)	6.75
560	Sunday Travel Sections and Vacation Travel Prospects: An Eight-Market Study (1980)	4.50
563	Women and Car Buying (1979)	3.00

NAB Research Reports (continued)

REPORTS ON SPECIFIC PRODUCTS AND SERVICES (continued)

		Member Prices
566	Food Shopping and Eating Patterns (1978)	$6.00
546	The New American Home (1981)	2.50
564	Young Singles and Vacation Travel (1978)	2.75
568	A Four-Market Survey of Financial Service Users (1977)	3.00

RETAIL

609	Wine Consumers' Sales Response to Advertising and Price Changes (1985)	3.00
596	How America Shops and Buys (1983)	4.00
592	Food Shopping in One-Person Households (1983)	2.75
587	The Emerging New Food Shopper (1982)	3.50
548	Supermarket Ads Move Merchandise (1981)	4/1.00
546	The New American Home (1981)	2.50
545	Women and Fashion: 1981 Study of Clothes Buying Attitudes and Behavior (1981)	$ 4.50
566	Food Shopping and Eating Patterns (1978)	6.00
565	Eat and Run: A National Survey of Fast Food Patronage (1978)	3.00

NAB Research Reports (continued)

RETAIL (continued)

		Member Prices
553	The Double Dividend: A Study of How Adverising Works for Department and Discount Stores (1977)	2.50
507	Retail Inserts in Daily Newspapers: A 4-Market Readership Study (1976)	2.50

SALES EFFECTS OF ADVERTISING

609	Wine Consumers' Sales Response to Advertising and Price Changes (1985)	3.00
610	A Field Experiment of the Sales Effectiveness of Direct Mail, ROP and Inserts (1985)	3.00
589	Coupon Facts: Findings on Cents-Off Coupon Usage and Users (1985)	2.00
548	Supermarket Ads Move Merchandise (1981)	4/1.00
551	The Sales Effects of National Newspaper Advertising for Two Package Goods Products (1978)	1.50
553	The Double Dividend: A Study of How Advertising Works for Department and Discount Stores (1977)	2.50
554	Color in Newspaper Advertising: Is It Worth The Money? (1974)	1.50

NAB Research Reports (continued)

RESEARCH NOTES

		Member Prices
583	No. 2--Daily Newspaper Coverage of People in High-Level Occupations (1982)	.50
584	No. 3--The Uses of Readers-Per-Copy Estimates (1982)	.50
585	No. 4--Television Program Listings: Newspapers vs. TV Guide (1982)	.50
588	No. 5--Moviegoers Assess Their Movie Theatres (1982)	.50
590	No. 6--The Newspapers's Potential as a Direct Response Medium (1983)	.50
591	No. 7--Yellow Pages Usage (1983)	.50
598	No. 8--How to Measure Weekday Newspaper Audiences (1983)	.50

NOTE: In some cases the same research study is listed under two categories.

Research Report

Newspaper Advertising Bureau, Inc. 1180 Avenue of the Americas, New York, New York 10036

VIEWER RECALL OF
THE "LAST" COMMERCIAL: 1965-1986

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

August 1986

Newspaper Advertising Bureau, Inc.

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HIGHLIGHTS

- Over a period of twenty-one years, the Newspaper Advertising Bureau has commissioned four telephone surveys of adults while they were viewing network television programs, between 6:00 and 9:30 pm. The first three surveys showed a steady decline in the proportion of viewers able to recall the brand advertised in the last commercial, from 18% in 1965, to 12% in 1974, and 7% in 1981. During the early part of this period, 30 seconds rather than 60 seconds became the dominant commercial length.

- The most recent survey, conducted in January 1986, showed the same level of recall as the 1981 survey--7%. National data indicate that during this five-year interval, average commercial length and average number of commercials per pod showed virtually no change. Fifteen-second commercials accounted for less than 10% of all those monitored in the six markets surveyed in 1986.

- The overall findings of the four surveys suggest that, even minutes after viewing, unaided recall is largely determined by average commercial length and average number of commercials per pod. On this basis, it can be expected that if 15-second commercials should become as dominant as 30-second commercials now are, recall of the last brand advertised might be expected to drop to less than 4% of viewers.

- Recall is roughly three times higher for commercials having the first or last position in a cluster than for those within the cluster. Commercials in the less desirable "middle" positions now represent 38% of all commercials, but if 15-second commercials become the norm, this proportion will go much higher.

- Apart from the low level of recall among network viewers, increased viewing options are eroding network reach. Estimates based on the two most recent surveys indicate that between 1981 and 1986, the total network audience during an average half-hour between 6:00 and 9:30 pm shrank from 40% to 32% of all adults.

- The overall results of the 1986 survey indicate that on an average weeknight in January, about 32% of all adults are viewing local network affiliates. On average, less than 11% are watching on a specific network affiliate. Only 2.3% of all adults recall the last commercial shown on any of the three network affiliates; 0.8% recall the last commercial shown on a specific network affiliate.

- In the 1986 survey, evening telephone interviews confirm patterns found in TV diary records: Adults with college backgrounds and those with higher family incomes watch less TV than downscale adults do. Differences in overall levels of viewing apply to network viewing as well.

INTRODUCTION

In 1965, 1974, 1981 and 1986, the Newspaper Advertising Bureau commissioned coincidental telephone surveys of adults viewing network television during the early evening and prime time. Each of these surveys used the same key questions to determine the percentage of viewers able to recall the name of the brand or company advertised in the last commercial to which they had been exposed. The part of the questionnaire used to determine recall level was changed only when changes in advertising practices necessitated a revision. (For example, a 1965 question about the identity of the program sponsor was dropped from later surveys.)

Purpose

The main purpose of the 1965 study was to obtain a benchmark measure of top-of-mind awareness of network television advertisers, as reflected by recall of the brand or company promoted in the last commercial to which the viewer had been exposed. In addition, the study explored the contexts for TV viewing (whether the respondent viewed alone or with someone else, who chose the program, whether viewing of that particular program was planned in advance, etc.) and their influence on recall.

The three later surveys, which used the same basic questions as the 1965 research, along with new questions, were intended mainly to track changes in evening and prime-time viewing conditions and the level of recall.

Method and Sample[1]

This research utilizes coincidental telephone interviewing. That is, respondents called between 6:00 p.m. and 9:30 p.m. who reported that they were viewing television on a local network affiliate station at the time of the interviewer's call were questioned on their recall of the last commercial they had seen. In other words, respondents were being asked about the last commercial seen within minutes of exposure.

The 1986 research differs from earlier surveys, in that some information was also obtained from respondents who failed to qualify for the commercial recall question because they were not watching TV at the time of the interviewer's call or because they were viewing independent channels, public television, cable channels or recorded VCR programs.

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1) All four surveys were similar in sample size, use of the coincidental measurement technique and question wording, but comments under "Method and Sample" refer specifically to the 1986 study.

These added interviews were used to estimate TV network affiliate coverage of total adults at home, and to check levels of coverage among major demographic segments.[1]

Approximately 168 respondents were interviewed in each of six markets: Albuquerque, Atlanta, Cleveland, Denver, Pittsburgh and Seattle.[2] The main criterion used in selecting these markets was geographic dispersion.

In all six markets, telephone dialings were based on prelisted sheets of random numbers within local exchanges. This means that the areas covered generally represent the central city and metropolitan suburbs but not the entire MSA or ADI. Interviews were conducted with the first adult contacted, except that a quota was set to ensure that at least 50% of the respondents would be men.

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1) In all tables that refer to the total sample, the number of qualified viewers has been weighted down to compensate for oversampling of this group.

2) The 1965 study was conducted in Des Moines, Seattle and Portland, Maine; the 1974 study, in Buffalo and Albuquerque; and the 1981 study in Albuquerque, Atlanta, Denver and Pittsburgh.

Interviewing was conducted from central locations within each of the six markets. Throughout the interviewing period and during the half-hour preceding the start of interviewing, local affiliates of the three networks were monitored in order to check accuracy of recall. In each market, three monitors (using synchronized clocks and stopwatches) taped and timed all commercials on local network affiliate stations.

Interviewing, editing and coding, weighting and tabulations were supervised by Burke Marketing Research, Inc. of Cincinnati, through Burke's Westport, CT, office.[1] The Newspaper Advertising Bureau was responsible for questionnaire design, data analysis and preparation of the report. Interviewing was conducted from January 27, 1986 through February 5, 1986. This report was written by Charles Lehman of NAB's Research Department.[2] The questionnaire used in the 1986 survey is available on request.

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1) Burke was also commissioned to conduct the 1974 and 1981 surveys. The 1965 study was conducted by N. T. Fouriezos & Associates.

2) For further information, call (212) 704-4564.

DETAILED FINDINGS

I. THE CHANGING TV ENVIRONMENT: A VIEW FROM THE MID-EIGHTIES

The Norm Is Two TV Sets Per Household

As of 1986, nationwide network television has been around for some thirty-five years, and the median age of all United States adults is forty. This means that watching TV is an integral part of the earliest childhood memories of half the adult population.

Now that the TV generation has come of age, it is reasonable to ask how the use of this powerful medium has changed over the years. The answer to this question has many facets, some of which may lie beyond the reach of statistics and surveys. One thing, however, is certain: Any notions of television viewing based on the early 1950s are sadly out of date. Many pieces of research evidence attest to that fact.

Perhaps the first point to be made is that TV sets, like automobiles, have become personal rather than household possessions; families no longer huddle around a single set. This survey conducted in January of 1986 finds that more than two-thirds of all adults report having two or more working TV sets in their homes (Table 1). The mean number of sets owned is 2.0, as compared with a mean of 1.4 in the 1965 survey. This change in the basic character of TV set ownership suggests that contemporary uses for TV are more intimate and at the same time more casual than in the 1950s. Some adults seem to use TV as a soothing background medium, not as a focus for their attention.

Table 1

Number of Working TV Sets in Household*
(by demographics)

	One	Two	Three or More	Mean Number
Total Respondents	30%	37%	31%	2.0
By sex:				
Male	31	36	31	2.0
Female	29	37	32	2.0
By age:				
18-34 years	32	37	29	1.9
35-54 years	26	35	40	2.1
55-64 years	28	41	30	2.0
65 or older	39	39	20	1.8
By education:				
Some college or more	33	35	31	2.0
High school graduate	24	41	35	2.1
Some high school or less	38	38	24	1.9
By household income:				
$35,000 and over	22	35	43	2.2
$20,000 - $34,999	30	40	29	2.0
Under $20,000	40	38	21	1.8
By city:				
Albuquerque	30	40	29	2.0
Atlanta	25	35	38	2.1
Cleveland	28	33	38	2.1
Denver	37	37	24	1.9
Pittsburgh	21	42	37	2.2
Seattle	40	35	22	1.8

Question: How many working TV sets do you have in your household?

* Refusals, "don't know" and "none" responses excluded (less than 2% of total sample).

About Half of All Evening Viewers Watch Alone

With two working TV sets in the average household, family viewing is an optional activity. Only 17% of all adults in this 1986 survey live in one-person households, but 49% of those who were watching TV at the time of the interviewer's call report that they were watching alone.[1]

Table 2

Number of People Viewing Last Program Watched
(by sex)

	Adults	Men	Women
Respondent only	49%	43%	56%
Respondent plus one other	33	37	29
Respondent plus two or more others	17	19	15
Base: Total adult viewers	(1,213)	(614)	(599)

Question: How many others besides yourself were watching the same program as yourself just now?

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1) As early as 1965, a survey using the same basic questionnaire as the present survey found that 41% of the adults contacted were watching alone.

Some "Sets In Use" Aren't Being Watched

In the most recent Burke survey, the prevalence of "sets in use" is evident in the finding that eight out of ten respondents (79%) report that one or more TV sets were on at the time of the interviewer's call. However, "sets in use" isn't the same as sets being watched; 14% of the total sample who were in the same room as a TV set in use failed to mention "watching TV" when asked what they were doing at the time of the telephone call. A few (5%) reported that a household TV set was turned on, but that "no one" was watching.

Table 3

Respondent Location and TV Sets in Operation At Time of Telephone Contact

	Percent
Total in room with TV set on	64%
TV viewing volunteered	50
Viewing not volunteered	14
Not in room with TV set on	15
Out of room for moment	4
Not in room at all	11
Someone else watching	6
No one else watching	5
No TV set on in household	21
Base: Total respondents = 100%	(1,514)

Upscale Adults Are Least Likely To Be Viewing

Over the years, TV diaries consistently show below-average levels of viewing by adults with college backgrounds, people with high family incomes and other upscale segments of the population. However, methodological research indicates that respondents who are asked to keep diaries tend to be lax about making hour-to-hour, or even day-to-day, entries. This has led some to suspect that upscale respondents merely claim to watch less TV.

Diary records may not be very precise, but this study of TV viewing, based on telephone interviews conducted between 6:00 and 9:30 pm, confirms the general patterns found in diaries. For example, 76% of those having incomes under $20,000 say that they were watching TV at the time of the interviewer's call, as compared with 60% of those with household incomes of $35,000 and over (Table 4). Similarly, 82% of those without a high school diploma report TV viewing, but only 62% of those with college backgrounds do so.

The three networks combined attract about two thirds of the total TV audience during this time period. Network coverage of demographic segments runs parallel with the percentage viewing any TV, but even among viewers the network share of audience varies; the networks draw 75% of the audience among those who are 65 or older, but only 63% of the viewers under 35 (not shown in table).

Table 4
Television Viewing Summary
(Total respondents, by demographics)

	Total Viewing				
	Any TV[a]	Network	Indep, PBS	VCR, Cable	Not Viewing
Total Respondents	67%	46%	14%	8%	33%
By sex:					
Men	70	46	15	9	30
Women	65	46	12	7	35
By age:					
18-34 years	67	42	15	11	33
35-54 years	64	44	13	7	36
55-64 years	72	51	11	10	28
65 years or older	75	56	17	2	25
By education:					
Some college or more	62	41	14	8	38
High school graduate	71	48	13	10	29
Some high school or less	82	60	16	7	17
By household income:					
$35,000 and over	60	40	12	9	40
$20,000 - $34,999	69	43	16	10	31
Under $20,000	76	56	13	7	24
By city:					
Albuquerque	67	45	16	6	33
Atlanta	70	45	14	11	30
Cleveland	65	48	12	5	35
Denver	70	46	14	10	30
Pittsburgh	67	48	8	11	33
Seattle	65	44	16	6	35

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a) In some cases, the figure shown for "Any TV" may vary from the sum of its three component parts because percentages have been rounded. About 4% of the respondents were viewing TV but were out of the room "for a moment" when the interviewer called.

Most Younger Adults Don't Plan Their Viewing

In response to a direct question, 55% of the qualified network viewers said that they had planned in advance to see the program they were watching at the time of the interviewer's phone call (Table 5). The same question was asked in the 1981 research, but results cannot be compared because the 1981 questionnaire included a screening question on who chose the program. Nevertheless, other evidence suggests that unplanned viewing is on the rise, and that loyalty to particular programs is rare among upscale segments of the audience.

Differences in the level of planned vs. unplanned viewing are highly correlated with the viewer's age. Among viewers who are 65 or older, 76% report that they had planned in advance to watch the program they were viewing. However, the percentage who say that they "just happened to watch" is noticeably higher in each younger age group, and highest of all (at 61%) among those under 35.

This difference may reflect more casual use of TV among younger adults, a greater propensity for channel switching, or a generally freer, less scheduled approach to leisure activities.

Table 5

Planned vs. Unplanned Viewing of Programs
(by demographics)

	Planned to Watch	Happened to Watch	Don't Know
Total local network viewers	55%	44%	1%
By sex:			
Men	51	48	1
Women	58	41	1
By age:			
18-34 years	37	61	2
35-54 years	52	47	1
55-64 years	67	31	2
65 years or older	76	23	1
By education:			
Some college or more	51	47	2
High school graduate	53	46	1
Some high school or less	66	32	2
By household income:			
$35,000 and over	43	56	1
$20,000 - $35,000	55	43	2
Under $20,000	63	36	1
By city:			
Albuquerque	42	57	1
Atlanta	55	42	3
Cleveland	64	36	-
Denver	52	46	2
Pittsburgh	59	41	-
Seattle	54	44	2

(See Appendix for bases.)

Question: Did you plan in advance to watch this program, or did you just happen to watch it?

An Evening at Home: Watching TV Isn't All People Do

As mentioned earlier (see Table 3, page 4), probing showed that 14% of all adults interviewed in the 1986 survey were in a room with a TV set in operation but had failed to mention watching TV when asked what they were doing. Another 5% of the total sample reported that a set was on but that nobody in the household was watching. Taken together, these two findings suggest that at any given time in about one out of five households, TV is being used as a background medium.

Table 6 might be called a snapshot of what adults at home are doing between 6:00 pm and 9:30 pm. About four out of ten are watching TV; nearly one-third are doing something else, such as cooking, eating, reading or balancing their checkbooks; the remainder (26%) are combining one of these activities with TV viewing.

As Table 6 indicates, exclusive concentration on television is somewhat more common among men than among women, and upscale adults are more likely to devote all of their attention to other activities. For example, probes indicated that 40% of those with incomes of $35,000 and over were not watching TV at the time of the interviewer's call, as compared with only 24% of those having incomes under $20,000. However, downscale adults may be somewhat more likely to combine viewing with other activities.

Table 6

Respondent's Activities at Time of Interviewer's Call
(by demographics)

	Viewing TV Only	Viewing TV Plus Other Activities	Other Activities Only
Total respondents	41%	26%	33%
By sex:			
Men	46	24	30
Women	36	29	35
By age:			
18-34 years	40	27	33
35-54 years	38	26	36
55-64 years	43	29	28
65 years or older	48	27	25
By education:			
Some college or more	35	27	38
High school graduate	47	24	29
Some high school or less	50	34	17
By household income:			
$35,000 and over	34	26	40
$20,000 - $34,999	44	25	31
Under $20,000	47	30	24
By city:			
Albuquerque	42	25	33
Atlanta	40	30	30
Cleveland	41	24	35
Denver	51	19	30
Pittsburgh	37	30	33
Seattle	34	32	34

Question: What were you yourself doing when I called just now?

(See Appendix for bases.)

What Changed--the Programming or the Audience?

In the face of evidence from A. C. Nielsen that hours of household TV usage per day were near a peak (7 hours, 7 minutes) during the 1984-1985 season, a 1984 Omnitel survey by R. H. Bruskin Associates reflected considerable disenchantment with the medium (Table 7).

Table 7

Attitudes Toward TV

	Agree	Disagree	Don't know, No opinion
There are too many other things to do rather than watch TV	77%	21%	2%
I don't have as much interest in watching TV as I did before	66	31	3
The programs on TV are not as interesting as they used to be	62	32	6
The excitement of television seems to have worn off for me	62	33	5
Television is my main source of entertainment	29	70	1

Source: The Bruskin Report, No. 128, December 1984

TV viewing is not an isolated activity but an integral part of a complex web of values, attitudes and activities sometimes called a "lifestyle". This means that changes in attitudes toward TV cannot be taken as prima facie evidence that the medium itself has changed for the worse, or that TV's golden age might be recaptured through better programming. Changing lifestyles can simply make TV viewing seem less relevant and less entertaining.

The Mid-Eighties Viewer Has Many Choices

A number of changes and technological advances have given today's TV viewers a confusing welter of program choices. Among these changes is an increase in the number of over-the-air stations.

Between 1965 and 1982, the total number of over-the-air TV stations in the United States increased by nearly 60%. Educational stations and non-affiliated independents have experienced a much higher rate of growth than network-affiliated commercial stations. As a result, the ratio of network affiliates to total TV stations fell by nearly twenty percentage ~~points (Table~~ 8).

Table 8

Over-the-Air TV Stations in the United States
(1965 vs. 1982)

	1965		1982	
	Number	Percent	Number	Percent
Total TV stations	668	100.0%	1,065	100.0%
Network affiliates	516	77.3	621	58.3
Non-affiliated independents	53	7.9	156	14.7
Educational stations	99	14.8	288	27.0

Source: Christopher H. Sterling, Electronic Media
(Praeger, 1984) pp. 19 - 25.

More than Four out of Ten Have Cable TV

Table 9 shows that 86% of the respondents in the six-market survey report that their homes are passed by cable, but this proportion varies considerably from city to city, with a low of 69% in Cleveland and a high of 98% in Pittsburgh.

Where cable is available, the majority of adults subscribe, and most of these subscribers opt for extra-pay channels. (A small number of cable subscribers, 3% of the total sample, don't know whether they have pay channels or basic cable only.)

Even "basic" cable represents an expense, so it is hardly news that subscribing to cable is most common in affluent households, and that this is particularly true for the extra-pay channels. More than half of all adults with family incomes of $35,000 or more have cable TV, and 36% have extra-pay channels. In contrast, only 17% of those with incomes under $20,000, and only 10% of adults who are 65 or older, report that they pay extra to receive special channels.

Table 9

Cable TV: Household Availability and Subscription
(by demographics)

	Cable Available*			
	Basic Only	Pay Cable	Don't Subscribe	Not Available
Total respondents	17%	25%	40%	14%
By sex:				
Male	17	27	38	14
Female	17	24	41	15
By age:				
18-34 years	16	29	37	15
35-54 years	15	32	35	14
55-64 years	22	23	38	15
65 years or older	20	10	56	13
By education:				
Some college or more	18	26	42	11
High school graduate	16	29	34	17
Some high school or less	17	17	43	18
By household income:				
$35,000 and over	18	36	32	11
$20,000 - $34,999	18	28	35	15
Under $20,000	17	17	47	17
By city:				
Albuquerque	11	22	37	13
Atlanta	13	28	42	16
Cleveland	14	23	29	31
Denver	9	27	48	12
Pittsburgh	26	36	30	2
Seattle	29	16	40	12

Questions: Is cable TV available in your area? Does your household subscribe to cable TV? And do you pay extra for any special channels like HBO, Showtime or Disney Channel?

* Rows do not total 100% because forty-nine cable subscribers (3% of total sample) who did not know whether they had pay cable or basic cable only are not shown.

Nielsen Data Confirm the Surge in Viewer Options

The combined effect of more over-the-air stations and more widespread cable availability is reflected in the Nielsen Television Index reports, which show that, as of September 1985, 68% of U.S. households could receive nine or more TV stations (Table 10).

When cable channels as well as broadcast channels are taken into account, 84% can receive nine or more channels and 35% can receive twenty or more. However, a brief look at a typical TV log might show that at any given time several of the available channels are carrying the same program material.

Table 10

Number of Stations and Channels Receivable
per TV Household: 1964-1985

	1964	1972	1985	
	Stations	Stations	Stations	Channels
One to four	41%	17%	4%	3%
Five-six	33	22	9	5
Seven-eight	18	30	19	8
Nine-ten	8*	31*	21	9
Eleven-fourteen	NA	NA	26	25
Fifteen-nineteen	NA	NA	17	15
Twenty-twenty-nine	NA	NA	4**	16
Thirty or more	NA	NA	NA	19

Source: Nielsen Report on Television, 1986.

* Nine or more.
**Twenty or more.

VCRs Round Out the Viewer's Options

If we bypass interactive data-base systems that have not yet found a niche in the consumer market and the fast-fading juvenile craze of video games, then VCRs round out most of the popular uses for home TV sets in the mid-eighties.

In this six-market survey conducted in January 1986, 37% of all the respondents report that their households own VCRs. Among people of retirement age, the level of ownership is only 13%, as compared with 45% for those under 35. VCR ownership peaks in the highest family income bracket; 53% of those with family incomes of $35,000 and over own a VCR (Table 11).

Information on VCRs was incidental to the main objectives of the current survey, but other research indicates that owners use their VCRs both for taping and for viewing prerecorded cassettes. In October 1985, a Bruskin survey of 300 VCR owners found that 67% had rented one or more prerecorded cassettes "within the past month", and that 26% had rented ten or more.[1] A 1986 study by AGB Research in its Boston test market found that 60% of its VCR homes used their VCRs during an average week, 20% for recording only, 19% for playback only, and 21% for both. A 1985 study by Florida State University reported that 75% of VCR owners regularly fast-forward past commercials on playback.

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1) See The Bruskin Report, December 1985.

Table 11
Household VCR Ownership
(by demographics)

	Base: = 100%*	Own a VCR
Total respondents	1,514	37%
By sex:		
Male	755	41
Female	759	34
By age:		
18-34 years	535	45
35-54 years	467	47
55-64 years	211	28
65 or older	240	13
By education:		
Some college or more	792	42
High school graduate	508	37
Some high school or less	182	21
By household income:		
$35,000 and over	479	53
$20,000 - $34,999	397	38
Under $20,000	387	21
By city:		
Albuquerque	255	34
Atlanta	248	42
Cleveland	247	37
Denver	254	38
Pittsburgh	243	31
Seattle	267	43

Question: Do you or anyone else in your household own a VCR, that is, a videocassette recorder, or a Betamax?

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* Bases have been weighted to adjust for oversampling of network viewers.

Overview of Chapter One

Since the advent of the first coast-to-coast telecast in 1951, technological advances and other developments have transformed television and given the average viewer a tremendous increase in viewing options. The four most critical changes are:

1) Growth in the number of broadcast channels, especially independents and PBS stations;
2) Expansion of cable services (Nielsen reports that, as of September 1985, half of all TV households could receive fifteen or more channels.)
3) Increase in the number of TV sets per household, from a mean of 1.4 in 1965 to 2.0 in 1985;
4) An explosion in VCR ownership that permits "time-shifting", rental or purchase of pre-recorded material, and "zipping" of commercials.

Along with these developments, attitudes toward TV and personal uses of the medium have also changed. As the TV set has evolved into a personal rather than a household possession, television is no longer a medium that "brings the family together". TV households may rack up more hours of "sets in use" than ever before, but at the same time this technological marvel may be taken for granted, used as a background for other activities or ignored altogether. Casual uses of the medium are especially evident among members of "the TV generation".

II. TELEVISION COMMERCIAL RECALL: A STUDY IN ATTRITION

Top-of-Mind Recall: A 21-Year Record

How do changes in the TV viewing experience affect involvement with the commercial message, as measured by top-of-mind awareness? To explore this issue, the Newspaper Advertising Bureau has sponsored four surveys over the past twenty-one years. In all four surveys adults reached by telephone were screened in order to determine whether they were viewing a local network affiliate.[1] Qualified viewers were then asked to recall the last commercial shown. In 1974, 1981 and 1986, identification of any brand or company in the last cluster was counted as a correct response.

This measure is different from the familiar "Burke score", because respondents were given no cue to the type of product advertised. However, since 54% of the qualified viewers in the 1986 survey had been exposed to a commercial less than five minutes before the interview, unaided recall provides a suitable measure of top-of-mind awareness.

The first three surveys showed a steady decline in the percentage of viewers able to recall the brand in the last commercial, from 18% in 1965, to 12% in 1974 and 7% in 1981. Recall figures from the 1986 survey are virtually identical to the 1981 results (Table 12). Since all four surveys used the same key questions and since each study was based on interviews with more than 1,000 adults, it is highly unlikely that the results can be explained by chance variations.

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1) Network affiliates were monitored as a check on viewer recall.

Table 12

Viewer Recall of "Last" Commercial

	1965	1974	1981	1986
Correctly identify brand/company[a]	18%	12%	7%	7%
Correct brand	NA	12	7	6
Correct company	NA	*	*	1
Correct product line, not brand	2	4	2	2
Incorrect or no recall (total)	80	84	91	91
Earlier commercial recalled	14	8	4	3
Other commercial (not on program), incorrect	6	4	7	8
Don't know, no recall	60	72	80	80
Base: Local network viewers	(1003)	(1058)	(1010)	(1011)

Question: Thinking about the very last commercial that was shown... just before I called, can you tell me what product was advertised?
IF "DON'T KNOW": Can you recall anything at all about the type of product....
IF COMPANY NAME ONLY: What product/brand made by....
IF PRODUCT CATEGORY ONLY: What brand....

* Less than 0.5%.

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a) In the last three surveys conducted by Burke Marketing Research, responses that correctly identified the company were counted as "brand" responses when the commercial included no brand name (e.g., airlines or insurance companies).

Table 12 shows a very clear pattern of decline in recall between 1965 and 1981, with apparent stabilization between 1981 and 1986. What factors account for this pattern? At the time of the 1974 survey the reasons for decline seemed clear. Since 1965,the length of the average commercial had dropped from 60 seconds to 30 seconds, the exclusive exposure provided by "isolated" commercials had largely given way to clustering, and program sponsorship was largely a thing of the past.

The similarity in the 1981 and 1986 recall figures is also understandable: In 1974, 1981 and 1986, monitored commericals show little change in average commercial length or number of commercials aired per hour.[1] Reasons for the decline between 1974 and 1981 are elusive, but interviewing for the 1974 research was conducted in late October and early November, as compared with late January and early February in 1981 and 1986. If fall showings feature a higher proportion of "new" commercials, then the lower midwinter figures may reflect a "wearout" factor.

Trends in Recall Among Demographic Segments

Over the first three surveys every major demographic classification showed drops in the level of brand recall (Table 12), with the exception of high-income households between 1965 and 1974. Between 1974 and 1981, the large apparent drop in recall for adults under 35 may be a statistical artifact; the 1986 figures for young adults are more consistent with the pattern found in the two earliest surveys.

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1) In the 1986 survey less than 10% of all the commercials aired were 15s, so their maximum effect on recall levels would be limited to a fraction of a percentage point.

Table 13

Correct Brand Recall of Last Commercial
(by demographics)

	1965	1974	1981	1986
Total adult viewers[a]	18%	12%	7%	7%
By sex:				
Men	19	16	8	8
Women	16	8	6	7
By age:				
18-34 years	23	15	8	11
35-49 years[b]	19	12	7	6
50-64 years[b]	13	10	9	4
65 years or older	13	12	4	4
By education:				
Some college or more	16	13	7	7
High school graduate	19	13	8	6
Some high school or less	17	12	7	8
By household income level:				
Low	16	11	6	7
Middle	22	14	9	10
High	15	16	8	6

---

a) For bases, see Appendix, Base Table 1, which shows some changes in audience composition that may be attributed largely to changes in the adult population. None of these account for the overall decline in recall.

b) In the 1986 survey, the two middle classifications are 35-54 years, and 55-64 years.

What Percent of the Adult Population Recalls the Last Commercial?

Because of the need to monitor local network affiliates during interviewing hours, it was not feasible to conduct this telephone survey with a national probability sample. However, if it can be assumed that the six widely dispersed markets in the 1986 survey are fairly typical of the United States as a whole, the findings on recall can be used for a national estimate.

On the basis of telephone call records collected in the survey, it is estimated that on an average weeknight in January, Monday through Thursday, during an average half-hour between 6:00 pm and 9:30 pm, roughly 30% of all adults in the United States[1] are away from home. (See Table 14.)

Those who are at home viewing a local network affiliate represent about 67% of the total television audience, 45% of all adults at home, or 32% of total adults.

Assuming that television viewing and recall are equally distributed among the three networks, this would mean that the adults recalling any commercial shown in the last cluster would amount to 2% of all adults for the three networks combined, or 0.8% of adults for one network.

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1) All estimates exclude Alaska and Hawaii.

Table 14

Estimated Number of U.S. Adults Correctly Recalling Last Commercial
(January weeknight half-hour, 6 - 9:30)

	Number (000s)	Percent
Total adult population[a]	171,205	100.0%
Estimated number at home	119,844	70.0
TV set(s) on in household	94,505	55.2
Adults viewing television[b]	80,809	47.2
Viewing any network affiliate	54,443	31.8
Viewing one specific affiliate[c]	18,148	10.6
Recall last commercial (any of three networks)	3,938	2.3
Recall last commercial (single network)	1,370	0.8

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a) Projection based on SMRB, 1986 Study of Media & Markets.

b) Data from the 1986 Nielsen Report indicate that 84.3 million adults are viewing during the average minute between 8 and 9:30 pm.

c) Assumes equal shares of audience for ABC, CBS and NBC affiliates.

Factors Affecting Recall: Time After Viewing

The first three surveys in this series consistently showed that viewers contacted within less than four minutes of exposure to a commercial were most likely to recall the company or brand name; after that, recall rapidly decayed. The 1986 study is an exception to this general pattern. In the latest survey, level of recall does not appear to vary over time. The 1986 result may be a statistical artifact, because it is at odds with most research on human memory.

Table 15

Correct Brand/Company Recall of Last Commercial
(by length of time after viewing)

	1965	1974	1981	1986
Less than 4 minutes	26%	17%	12%	7%
4 minutes to 7 min, 59 sec.	13	13	5	8
8 minutes or longer	12	4	-	6

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1) Average time (median) between viewing of last commercial and start of interview for the four studies: 1965 - 5 min, 4 sec; 1974 - 4 min, 25 sec; 1981 - 4 min, 18 sec; 1986 - 4 min, 37 sec.

Recall Favors Longer Commercials

During the interviewing period, 5,549 commercials were aired in the six markets surveyed. As in 1981, 30-second commercials predominated, accounting for 80% of all those aired.[1] Comparing total commercials aired with those recalled by respondents suggests that longer messages are more memorable, but the total number recalled is too small to yield a definitive answer on this point.[2]

Table 16

Recall of Last Commercial
(by length of commercial)

Length*	Total Commercials Aired	# Commercials Recalled	% of Aired Commercials Recalled
Total	5,549	88	1.6%
5	94	1	1.1
10	243	1	0.4
15	538	6	1.1
20**	40	2	5.0
30	4,418	70	1.6
45	52	1	1.9
60	110	4	3.6
Over 60	52	3	5.8

* In seconds.
** Small base. Shown only for consistency.

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1) In 1981, 30's represented 86.5% of all network commercials; in 1984, 30's accounted for 85.1% of the total. (Both figures exclude local spots on affiliate stations.) Source: "Trends in Television", Television Bureau of Advertising.

2) Data from the six markets surveyed in 1986 also suggest that the number of commercials per half-hour may affect recall levels, but none of the markets show a significant difference from the average recall level. (See Appendix Table 3.)

How Is Recall Affected by Position in the Cluster?

In this coincidental study of commercial recall, respondents were asked about the "last" commercial they had seen.[1] More than 90% of the qualified viewers were called between clusters, which should heavily favor commercials that actually were in the last position. However, commercials in the first position fared as well as, or better than, those in the last position. Commercials in middle positions are clearly at a disadvantage, representing 38% of all those aired but only 16% of those recalled.

Table 17

Recall of Last Commercial
(by position in cluster)

	Total Commercials Aired	# Commercials Recalled	% of Aired Commercials Recalled
Total	5,549	88	1.6%
First	1,803	42	2.3
Middle	2,122	14	0.7
Last	1,622	32	2.0

---

1) Identification of any commercial in the last cluster was accepted as correct recall of the "last" commercial.

How Much Does Recall Depend on Repeated Exposures?

Among respondents showing correct or partial recall of the last commercial, only 31% of the adults in the first survey in 1965 said that they had seen it before. Over the four surveys, awareness of previous exposure increased significantly, reaching 62% in the 1986 study (Table 18).[1]

This striking difference between the first survey and the three later surveys may reflect the fact that the average commercial is now shown over a longer period of time than in the sixties. It may also mean that one showing is no longer enough to get through to viewers who have become very adept at tuning out unwanted messages.

Table 18

Previous Awareness of Commercials Correctly Identified

	1965	1974	1981	1986
First time seen	NA	20%	29%	35%
Have seen before	31%	52	58	62
Not sure, don't know	NA	28	15	3
Base: Those recalling commercial	(176)	(127)	(72)	(73)

Question: Is this the first time you've seen this commercial, or do you recall having seen it before?

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1) Between 1974 and 1986, the percent claiming first-time exposure also increased. During the same period there was a sharp decrease in "don't know" responses.

The Level of Accidental Viewing Is Low

In all four surveys, viewers were asked, "Were you yourself personally watching television, or did you just happen to be in the room?" The response to this question is remarkably constant over time: In 1974, 1981 and 1986 nine out of ten network viewers describe themselves as personally watching (Table 19).

Table 19

"Personally Watching" vs. "Just Happened To Be In Room"

	1965	1974	1981	1986
Personally watching	83%	90%	89%	90%
Just happened to be in room	17	10	11	10

Because the level of "accidental" viewing is so low, it cannot have any major effect on commercial recall, but all four surveys show lower recall among those who "just happened" to be in the room (Table 20).

Table 20

Correct Brand/Company Recall

	1965	1974	1981	1986
Personally watching	19%	13%	8%	8%
Just happened to be in room	11	5	1	2
Base: Adult viewers	(1003)	(1058)	(1010)	(1011)

Other Activities Interfere with Commercial Recall

This research documents the commonsense notion that divided attention may be only slightly better than no attention at all. All four surveys show that recall is adversely affected when the viewer is also working, talking, reading or engaging in some other activity (Table 21).

Table 21

Correct Brand Recall of Last Commercial
(by personal activities)

	1965	1974	1981	1986[a]
Watching TV only	20%	15%	9%	9%
Watching TV plus other	10	10	4	3

a) The 1986 figures do not include respondents who disclosed that they were watching TV only in response to probing. That is, these recall figures refer only to those who volunteered information on their TV viewing.

The evidence that other activities interfere with recall is notable because of indications that roughly four out of ten who are "watching" TV are also doing something else at the same time (Table 6, p. 10).

Some Viewing Conditions Have Little Effect

Although people who describe themselves as "personally watching" are more likely to recall commercials than those who "just happen to be in the room", other viewing conditions investigated in this survey appear to have little effect on recall levels.

Table 22

Correct Brand/Company Recall: 1986
(by viewing conditions)

	Percent Recalling
Planned in advance to watch	6%
Just happened to watch	6
Watched alone	5
Watched with other(s)	7
Interviewed before 8 pm	6
Interviewed 8 pm or later	6
Base: Local network affiliate viewers = 100%	(1,011)

Questions: Did you plan in advance to watch this program, or did you just happen to watch it? How many others besides yourself were watching the same same program as yourself just now?

Overview of Chapter Two

Over a 21-year period, four telephone surveys were conducted during the early evening and prime time with adults who were watching TV on local network affiliates. During this time, the percentage of viewers able to recall the brand in the last commercial[1] slipped from 18% in 1965, to 12% in 1974, and 7% in 1981. A 1986 survey also showed a 7% level of recall among viewers. In all of these surveys the majority of viewers were contacted less than five minutes after viewing a commercial cluster.

The 1986 research shows that:

> Sixty-second commercials are more likely to be recalled than 30s are. In turn, 30s are more likely to be recalled than 15s.
>
> Commercials in the first or last position in a pod have a three-to-one edge in recall over those in middle positions.
>
> Six out of ten viewers correctly recalling a commercial said that they had seen it before.
>
> Recall is significantly lower among people who combine viewing with other activities--about 40% of the audience.

These results were consistent with findings from earlier surveys, but the 1986 research failed to confirm the rapid fall-off in recall within minutes of viewing, shown in all of the other three. Reasons for this difference are unclear.

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1) In the three most recent surveys, recall of any commercial in the last cluster was accepted as a correct response.

APPENDIX

Appendix Base Table 1

	Year of Survey			
Number of respondents:	1965	1974	1981	1986
Total viewers	1,003	1,058	1,010	1,011
By sex:				
Men	477	518	508	501
Women	526	540	502	510
By age:				
18-34 years	287	364	366	326
35-49 years[a]	293	268	192	298
50-64 years[a]	246	254	225	157
65 years or older	161	153	209	195
By education:				
Some college or more	291	343	403	470
High school graduate	378	421	383	361
Some high school or less	323	267	198	158
By household income level:				
Low	318	363	203	315
Middle	429	231	141	249
High	141	244	505	278
By market:				
Albuquerque	-	526	254	167
Atlanta	-	-	256	163
Buffalo	-	532	-	-
Cleveland	-	-	-	174
Denver	-	-	251	172
Des Moines	NA	-	-	-
Pittsburgh	-	-	249	166
Portland, ME	NA	-	-	-
Seattle	NA	-	-	169

a) In the 1986 survey the two middle age classifications are 35-54 years and 55-64 years.

Appendix Base Table 2

	Number
Total respondents (1986, unweighted)[a]	1,512
Qualified network viewers	1,011
All other respondents	501
By sex:	
Men	752
Women	760
By age:	
18-34 years	516
35-54 years	458
55-64 years	220
65 years or older	260
By education:	
Some college or more	756
High school graduate	520
Some high school or less	203
By household income:	
$35,000 and over	454
$20,000 - $34,999	387
Under $20,000	420
By market:	
Albuquerque	253
Atlanta	246
Cleveland	252
Denver	255
Pittsburgh	245
Seattle	261

a) In the text of the report any figures shown for total respondents have been weighted to adjust for oversampling of qualified network viewers.

Appendix Table 3

Average Number of Commercials per Half-hour vs. Recall
(by market)

	Average Number of Commercials per Half-Hour	Percent of Viewers with Correct Recall
Atlanta	13.2	4.3%
Seattle	12.1	6.5%
Albuquerque	11.1	9.0%
Cleveland	11.0	8.0%
Pittsburgh	10.9	4.8%
Denver	9.9	10.4%
Average for six markets	11.4	7.2%